Enfocus

Instant 09 PDF

User guide

enfocus

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Contents

Chapter 1: **Getting Started 11**

The Instant PDF Documentation Set 12
Using the Instant PDF Help Set 12
System Requirements 14
Installing Instant PDF 15
Starting and Configuring Instant PDF 15
Installing Predefined PDF Queues 16
Buying and Registering Enfocus Instant PDF 17
Getting Support 17
Setting the Instant PDF Preferences 18
Preferences > Personal Information 19
Preferences > Language 19
Preferences > Messages 20
Preferences > Updates 20
Preferences > Units 21
Preferences > CertifiedPDF.net Membership 21
Preferences > CertifiedPDF.net Synchronize 22
Preferences > Jobs Location 22
Preferences > Jobs Processing 23
Preferences > Jobs Color Management 24
Preferences > Jobs History 25
Preferences > Help Location 25
Preferences > Applications 26
Preferences > E-mail Server 26

Chapter 2: **Creating Certified PDF Documents 29**
Understanding the PDF Creation Process 30
Creating PDF Documents the Conventional Way: Trial and Error 30
Creating PDF Documents the Enfocus Way: the One-Step Process to an Output-Ready PDF File 32
What Is an Enfocus PDF Queue? 33
Viewing PDF Queues 33
Creating a Certified PDF Document in QuarkXPress 7 or 8 35
Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5 36
Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5 37
Creating a Certified PDF Document in Adobe Acrobat 8 or 9 38
Creating a Certified PDF Document in Mac OS X 39
Creating a Certified PDF Document from PostScript or PDF Files 40
Creating a Certified PDF Document by Printing to a Virtual Printer 40

Chapter 3: **Preflighting PDF documents 45**
Preflighting 46
Preflight Profiles 46
Preflight Report 47

Chapter 4: **Using Action Lists 51**
Definition and Purpose of an Action List 52
Action Types 53
Action Lists in Practice 55
Further Automation 57

Chapter 5: **Working with Certified PDF documents 61**
About Certified PDF 62
Guaranteed Preflighting 62
Document Consistency 64
Responsibility 65
The Certified PDF Workflow Explained 66
What Is an Enfocus Certified PDF Document? 67
Certified PDF User Identification 67
Certified PDF Document Status 68
Starting a Certified PDF Workflow for a PDF document 68
Checking the Certified PDF Status of a PDF Document 70
Viewing the Preflight Report of a Certified PDF Document 71
Viewing the Edit Log File 71
Viewing the Editing Sessions 72

Chapter 6: **Managing Jobs 75**
What is a Job? 76
Viewing Jobs 76
Job Processing Explained 78
Creating a New Job 78
Canceling a Job 79
Pausing and Resuming a Job 80
Deleting a Job 80
Saving PDF Files and/or Jobs 81
Reviewing a PDF Document 82

Chapter 7: **Creating and Editing PDF Queues 85**
Creating a New Enfocus PDF Queue 86
Editing an Enfocus PDF Queue 87
Using Variables When Configuring PDF Queues 89
PDF Queue Properties 90
Information 91
Author 92
Color Management 92
Locking 93
File Name 95
PostScript to PDF 96
Output Options 97
QuarkXPress 7 or 8 98
Adobe InDesign CS3, CS4 or CS5 100
Adobe Illustrator CS3, CS4 or CS5 102
Virtual Printer 103
Mac OS X 105
Existing File 105
Correction 106
Preflight 108
Review 109
Save 110
E-mail 112
FTP 113
Enfocus PowerSwitch 114
Summary 115

Chapter 8: **Managing PDF Queues 119**
Importing a PDF Queue 120
Exporting a PDF Queue 121
Duplicating a PDF Queue 122
Deleting a PDF Queue 123
Sorting PDF Queues in the PDF Queues List 123

Chapter 9: Using and Managing CertifiedPDF.net PDF Queues 127

What is CertifiedPDF.net? 128

Checking the CertifiedPDF.net Status of Your PDF Queue in Instant PDF 129

Synchronizing a PDF Queue with CertifiedPDF.net 130

Uploading and Publishing a PDF Queue on CertifiedPDF.net 133

Subscribing to a PDF Queue–based Specification on CertifiedPDF.net 136

Index 139

Chapter 1

Chapter 1: Getting Started

About This Chapter

This chapter puts you on the right track after you have purchased Instant PDF. It describes how to install Instant PDF and predefined PDF Queues and how to set the preferences. You also find an overview of the various components of the Instant PDF documentation set and brief instructions on how to use the Instant PDF Help.

Topics

In this chapter:

- The Instant PDF Documentation Set 12
- Using the Instant PDF Help Set 12
- System Requirements 14
- Installing Instant PDF 15
- Starting and Configuring Instant PDF 15
- Installing Predefined PDF Queues 16
- Buying and Registering Enfocus Instant PDF 17
- Getting Support 17
- Setting the Instant PDF Preferences 18
- Preferences > Personal Information 19
- Preferences > Language 19
- Preferences > Messages 20
- Preferences > Updates 20
- Preferences > Units 21
- Preferences > CertifiedPDF.net Membership 21
- Preferences > CertifiedPDF.net Synchronize 22
- Preferences > Jobs Location 22
- Preferences > Jobs Processing 23
- Preferences > Jobs Color Management 24
- Preferences > Jobs History 25
- Preferences > Help Location 25
- Preferences > Applications 26
- Preferences > E-mail Server 26

The Instant PDF Documentation Set

The Instant PDF User Guide

The Instant PDF User Guide explains the main Instant PDF concepts and provides you with step-by-step instructions on how to work with Instant PDF. Moreover, you learn about other Enfocus core technologies that are integrated into Instant PDF, such as Preflight Profiles, Action Lists and Certified PDF.

All the information in the Instant PDF User Guide is also available as online Help.

To access the Instant PDF User Guide:

In the main window of Instant PDF, choose **Help** > **Documentation** > **User Guide (PDF)**.

The User Guide will be opened in Adobe Acrobat or Adobe Reader. In Mac OS X, it can also be opened in Preview or any other application that is associated with PDF.

See also:

- "Preferences > Help Location" on page 25

Related Documentation

You can find related documentation in the **Resources** section on CertifiedPDF.net:

1. Go to www.certifiedPDF.net
2. Click **Resources** > **Help**.

Using the Instant PDF Help Set

Accessing the Instant PDF Help

You can access the Instant PDF Help in the following ways:

- From within Instant PDF
- From the preflight report

To access the Instant PDF Help from within Instant PDF:

Do one of the following:

- In the main window of Instant PDF, choose **Help** > **Documentation > Instant PDF Help (HTML)**.
- Click the **Help** button ([?]) in the **Help** area one of the Instant PDF windows.

To access the Instant PDF Help from the preflight report:

- Click the question mark (?) preceding the error or warning entry in the preflight report.

The corresponding Help topic appears in your browser window, displaying the cause and possible solutions for the error message which appeared in the preflight report.

Finding the Right Help Topic

In the main window of Instant PDF, choose **Help** > **Documentation** > **Instant PDF Help (HTML)**. You will see that the **Help** window consist of two frames:

- The **Navigation** frame on the left. This is where you see the **Contents**, **Index** and **Search** tabs and the titles of the Help volumes: Quick-Start Help, Enfocus Instant PDF Help and Preflight Report Help.
- The **Topic** frame on the right. This is where you will see the actual text of the topic.

You can quickly find the relevant Help topic in several ways:

- Finding a Help topic by title (**Contents**)
- Finding a Help topic by keyword (**Index**)

- Finding a Help topic by searching for keywords (**Search**)

Finding a Help topic by title

Finding a Help topic by title is like you would use the table of contents in a printed User Guide.

Proceed as follows:

1 Click the **Contents** tab at the top of the **Navigation** frame.

2 Click a title in the **Navigation** frame.

The corresponding topic appears in the **Topic** frame.

Finding a Help topic by keyword

Finding a Help topic by keyword is like you would use the index in a printed User Guide. The index is a list of keywords arranged in alphabetical order.

Proceed as follows:

1 Click the **Index** tab at the top of the **Navigation** frame.

2 Click the first letter of the keyword you are searching for.

The corresponding keywords appear in the **Navigation** frame.

3 Click the index entry of your choice to view the corresponding Help topic.

Finding a Help topic by searching for keywords

You can use the **Search** function of the Instant PDF Help to find all topics that contain specific words. This is like you would use a search engine to find a Web page on the Internet.

Proceed as follows:

1 Click the **Search** tab at the top of the **Navigation** frame.

2 In the **Search** box, type the word(s) you expect to see in the Help topics you are looking for. Observe the following tips:

- You can search for multiple words. Just type them in the **Search** box, separated by spaces. For example, if you want to find information about synchronizing a PDF Queue, just type **synchronize** and **queue**.
- Avoid special characters and punctuation marks. For example, do not type **"synchronize"+"queue"**, but just **synchronize queue**.
- The result of your search will always be topics which contain the words exactly as you typed them in the **Search** box. So if you can't see the relevant topic in the list of found topics, try again and use an alternative spelling or the singular or plural form. Examples:

Search for...	not...
synchronize	synchronise
e-mail	email
QuarkXPress	Quark Xpress

3 Select the Help volume in which you want to search for these words. If you are not sure where you will find the relevant topic, select **All Available Books**.

4 Click the **Search** button.

The topics found are listed in the **Navigation** frame:

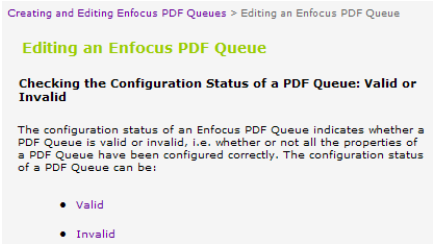
- The topics will be sorted by relevance: the most relevant topic will appear on top of the list.
- The topic titles will be preceded by a figure. This is a ranking score which the topic gets, depending on where and how often the words you searched for appeared in the topic. If the words you searched for appear in the main title of the topic, this topic will most likely get a ranking score of 100 and be on top of the list.
- If you searched for words in **All Available Books**, the topic titles will be followed by the title of the corresponding Help volume in which they were found.

5 Click the topic title of your choice to view the corresponding Help topic.

Navigating in Help Topics

You can use the following navigation aids at the top of the Topic frame when viewing Help topics:

- Click the **Show in Contents** button ( ) to see the chapter and volume in the Instant PDF Help where this topic is described. The corresponding chapter and volume in the **Contents** tab will be expanded. You may wish to do this to find related topics in the same chapter.
- Click the Previous Topic ( ) and Next Topic ( ) buttons to browse through the topics in the order as they appear in the **Contents** tab. This is like paging through a printed book.
- Just above the main title of each topic, you will see a hyperlink to the topic "above". These hyperlinks are called "breadcrumbs" because they show you where you are in the hierarchy of the Instant PDF Help. Clicking the breadcrumb will take you back to the chapter title.


Creating and Editing Enfocus PDF Queues > Editing an Enfocus PDF Queue
Editing an Enfocus PDF Queue
Checking the Configuration Status of a PDF Queue: Valid or Invalid
The configuration status of an Enfocus PDF Queue indicates whether a PDF Queue is valid or invalid, i.e. whether or not all the properties of a PDF Queue have been configured correctly. The configuration status of a PDF Queue can be:
Valid
Invalid

"Breadcrumbs" above the title of the topic show you where you are in the hierarchy of the Instant PDF Help.

System Requirements

See the Enfocus Web site

The system requirements are listed on the Product Info pages on the Enfocus Web site (www.enfocus.com).

Installing Instant PDF

To install Instant PDF:

1 Insert the Enfocus Software DVD into your DVD drive.

A window displays the contents of the DVD.

In Microsoft Windows, the Installer will start automatically.

2 Alternatively, download Instant PDF from the Enfocus Web site (www.enfocus.com).

3 Double-click the appropriate installer icon in the Installers folder.

4 Follow the installation instructions on your screen.

Starting and Configuring Instant PDF

Configuring Instant PDF

When you have installed Instant PDF and you start it for the first time, you will be prompted to configure Instant PDF. This basically means filling in your personal contact information and your CertifiedPDF.net account information, if available.

To start and configure Instant PDF:

1 Do one of the following:

- In Microsoft Windows, choose **Start** > **All Programs** > **Enfocus Instant PDF 09**.
- In the Mac OS, choose **Applications** > **Enfocus** > **Enfocus Instant PDF 09** > **Instant PDF**.

The **Enfocus Instant PDF Configuration** wizard appears.

2 Do one of the following:

- Leave the **Show again next time** check box selected if you wish to check and, if necessary, change your personal or CertifiedPDF.net information the next time you start Instant PDF.
- Click to clear the **Show again next time** check box if you don't wish to see the **Enfocus Instant PDF Configuration** wizard the next time you start Instant PDF.

3 Click **Next** and fill in your personal contact information.

The information which you provide here will be used later in Instant PDF and in the Certified PDF workflow. For example, your name and e-mail address will automatically be filled in when your create a new PDF Queue. Some of the information will be used in the preflight report.

4 Click **Next** and do one of the following:

5 If you already are a member of the CertifiedPDF.net community, fill in your CertifiedPDF.net account information, i.e the e-mail address and password which you use to log on to CertifiedPDF.net.

- If you wish to become a member of CertifiedPDF.net, click the **Become a Member** button.

- If you do not wish to become a member of CertifiedPDF.net (yet), you can leave this dialog box blank.

6 Click **Done**.

See also:

- "Setting the Instant PDF Preferences" on page 18
- "Using and Managing CertifiedPDF.net PDF Queues" on page 127

Installing Predefined PDF Queues

PDF Queues Created by Enfocus

A number of predefined PDF Queues will be installed automatically along with Instant PDF. You can use these PDF Queues as soon as you start Instant PDF.

PDF Queues Created by Third Parties

Not only Enfocus, but also third parties may have created PDF Queues. The Ghent PDF Workgroup, for example, may have created ready-to-use PDF Queues and published these on CertifiedPDF.net.

You can install predefined PDF Queues in Instant PDF to get started right away. You can do this:

- By Importing a PDF Queue, see page 120.
- By Subscribing to a PDF Queue-based Specification on CertifiedPDF.net, see page 136.

See also:

- www.ghentpdfworkgroup.org
- www.certifiedPDF.net

Buying and Registering Enfocus Instant PDF

Try and Buy

You may have installed and tested a 30-day trial version of Instant PDF and you now want to purchase a Product Key. If so, you can access the respective purchase order page on our Web site from within your trial version of Instant PDF.

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2. Choose **Help** > **Buy Now**!
3. Follow the instructions on our Web site.

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To register Instant PDF, you need a Product Key. You receive this Product Key when you purchase Instant PDF. To qualify for product upgrades and free technical support, you must register Instant PDF. You can register online.

To register Instant PDF online:

1. Start Instant PDF.
2. Choose **Help** > **Support** > **Register Online**.
3. Fill out the online registration form.
4. Click **Register now**.

See also:

- "Getting Support" on page 17.

Getting Support

Providing Support Information

When you work with registered Enfocus products, you are entitled to free technical support. When contacting the Enfocus Customer Support Department, it is important that you can provide our support engineers with the necessary information about the configuration of your computer system and the Enfocus product(s) you are using. To this end, we have included this support information in the dialog box about Instant PDF which you find in the Help menu. You can easily copy this information and paste it in a text file or an e-mail message which you can then send to our Customer Support Department.

Consulting the Enfocus Knowledge Base

The Enfocus knowledge base provides a wealth of information on more specialized topics or recent issues. The knowledge base articles are arranged by Enfocus product and you can use keywords to quickly find the relevant article in the knowledge base.

To consult the Enfocus Knowledge Base:

- In Instant PDF, choose **Help** > **Support** > **Search Knowledge Base** on Windows, or **Help** > **Search Knowledge Base** on Mac OS X.

or

- Go to the Enfocus Web site (www.enfocus.com) and choose **Support** > **Knowledge base**.

Reporting a Problem

Although our Software Development and Quality Control teams do their utmost to ensure that our software products and their documentation are up to quality standards, there may be an occasion where you experience a problem in using Instant PDF. If so, you can report this problem to our Customer Support Department. Our support engineers will give your problem immediate attention and will try to help you with accurate, to-the-point information or hands-on assistance.

To report a problem:

1 Choose **Help** > **Support** > **Report a Problem on Windows**, or **Help** > **Report a Problem** on Mac OS X.

2 Fill out the online form and click **Submit**.

Setting the Instant PDF Preferences

Categories of Preferences

Proceed as follows to access the Instant PDF Preferences:

1 In the Instant PDF window, choose **File** > **Preferences** on Windows, or **Instant PDF** > **Preferences** on Mac OS X.

2 Click the categories of your choice and fill in the respective preferences:

- Preferences > Personal Information
- Preferences > Language
- Preferences > Messages
- Preferences > Updates
- Preferences > Units
- Preferences > CertifiedPDF.net Membership
- Preferences > CertifiedPDF.net Synchronize
- Preferences > Jobs Location
- Preferences > Jobs Processing
- Preferences > Jobs Color Management
- Preferences > Jobs History
- Preferences > Help Location
- Preferences > Applications
- Preferences > E-mail Server

Preferences > Personal Information

Name and Contact Details

The personal information includes your name and company contact details, together with a message, if any. It is important that you provide as much personal information as possible, because this information will also be stored in the Certified PDF documents which you will be creating. Thus, the recipients of your PDF documents will be able to contact you if they have any questions.

To specify your personal information in the preferences:

Choose **File** > **Preferences** > **Personal Information** on Windows, or **Instant PDF** > **Preferences** > **Personal Information** on Mac OS X, and fill out the form.

Preferences > Language

Language of the Instant PDF User Interface

You can select the language in which you wish to see the user interface of Instant PDF.

To set the language of the Instant PDF user interface:

Choose **File** > **Preferences** > **Language** on Windows, or **Instant PDF** > **Preferences** > **Language** on Mac OS X, and select the language of your choice.

Preferences > Messages

Enabling and Disabling All Messages

When using Instant PDF, you will receive messages. For example, if you select a PDF Queue and click the **Delete** button, a message will appear, asking for your confirmation. You can disable some of these messages by clicking the option **Don't show this message again** in the respective dialog box.

Reviewing file with the review plug-in.
The PDF file will be opened so you can review it. When you are done reviewing just click the review button on the Acrobat toolbar.
OK
Don't show this message again

Some messages can be disabled by clicking the corresponding option in the dialog box.

You can specify the behavior of all messages in the Instant PDF preferences: enable them all or disable them all.

To enable or disable all messages:

Choose **File** > **Preferences** > **Messages** on Windows, or **Instant PDF** > **Preferences** > **Messages** on Mac OS X, and follow the on-screen instructions in the **Help** area.

Preferences > Updates

Updating Instant PDF

Instant PDF can automatically check at regular intervals whether updates of the program are available. You can determine how often this check has to be done.

To set the frequency of checking for updates:

1. Choose **File** > **Preferences** > **Updates** on Windows, or **Instant PDF** > **Preferences** > **Updates** on Mac OS X.
2. Select how often you want Instant PDF to check for updates:

- If you select every so often, you'll only receive a message when Instant PDF is out of date.
- If you select **Manually**, you'll receive a message at all times, so if Instant PDF is up-to-date or out-of-date.

You can always check for updates of Instant PDF at a convenient time by choosing **Help** > **Check for Updates**.

Preferences > Units

Units in Instant PDF and in the preflight report

You can select a default unit of measurement. You will use this unit in the **Enfocus PDF Queue Editor**, for example when specifying bleed size as an output option, but it will also be used in the preflight report.

To specify the default unit of measurement:

1 Choose **File** > **Preferences** > **Units** on Windows, or **Instant PDF** > **Preferences** > **Units** on Mac OS X.

2 Select a unit of measurement.

See also:

- "Output Options" on page 97

Preferences > CertifiedPDF.net Membership

CertifiedPDF.net User Information

You can visit the CertifiedPDF.net Web site from within Instant PDF. You may wish to do this for different reasons:

- To keep your local PDF Queues synchronized with corresponding PDF Queues on CertifiedPDF.net
- To upload your PDF Queues to CertifiedPDF.net and publish them in a PDF Specification.
- To become a member of CertifiedPDF.net.

To be able to do this, you have to fill in your CertifiedPDF.net user information (your e-mail address and a password) in the preferences.

To set the preferences for your CertifiedPDF.net account

1 Choose **File** > **Preferences** > **CertifiedPDF.net Membership** on Windows, or **Instant PDF** > **Preferences** > **CertifiedPDF.net** on Mac OS X.

2 Do one of the following:

- If you wish to become a member of CertifiedPDF.net, click **Become a Member**.
- If you wish to check out CertifiedPDF.net first, click **Visit CertifiedPDF.net**.
- If you already are a member of CertifiedPDF.net, type the e-mail address and password of your CertifiedPDF.net account click **OK**.

See also:

- www.certifiedPDF.net
- "Working with Certified PDF documents" on page 61
- "Using and Managing CertifiedPDF.net PDF Queues" on page 127
- "Subscribing to a PDF Queue-based Specification on CertifiedPDF.net" on page 136

Preferences > CertifiedPDF.net Synchronize

Frequency of Synchronizing

If you are a member of the CertifiedPDF.net community and you are using a PDF Queue which originates from a Specification on CertifiedPDF.net, you can easily synchronize this PDF Queue. Synchronizing a PDF Queue always means that the PDF Queue from the Specification on CertifiedPDF.net is downloaded and its settings are applied to the corresponding local PDF Queue, although this will mainly occur in the background.

You can specify how frequently you want Instant PDF to check the CertifiedPDF.net Web site for updates of PDF Queues in Specifications to which you have subscribed.

To set the preferences for synchronizing PDF Queues with CertifiedPDF.net:

1 Choose **File** > **Preferences** > **Synchronize** on Windows, or **Instant PDF** > **Preferences** > **Synchronize** on Mac OS X.

2 Select how often you want Instant PDF to check for updates of the PDF Queue.

If you do not want Instant PDF to check for updates of PDF Queues automatically at regular intervals, you can choose to check **manually**. You can then synchronize this PDF Queue at a convenient moment, simply by selecting the PDF Queue and clicking the **Synchronize** button or choosing **PDF Queue** > **Synchronize**.

See also:

- Using and Managing CertifiedPDF.net PDF Queues > "Synchronizing a PDF Queue with CertifiedPDF.net" on page 130

Preferences > Jobs Location

Storing Jobs

You can specify the folder where jobs have to be stored. The following subfolders will be created automatically:

- An **Active** folder for jobs in progress
- A **Failed** folder
- A **Successful** folder

To specify the folder to store jobs:

1 Choose **File** > **Preferences** > **Jobs Location** on Windows, or **Instant PDF** > **Preferences** > **Job Location** on Mac OS X.

2 Do one of the following:

- Click **Use Default** to store jobs in the default folder.
- Click **Browse** to select a folder of your choice.

Make sure that you have sufficient disk space available on the drive where you store the jobs.

See also:

- "Preferences > Jobs History" on page 25

Preferences > Jobs Processing

Instant PDF Interacting with Other Applications

Although Instant PDF is a stand-alone software program, it can, and in most cases will, interact with other applications as jobs are being processed:

- You can use Acrobat Distiller in the PDF creation stage of your workflow.
- You can use Instant PDF as a plug-in for Adobe InDesign, Adobe Illustrator, QuarkXPress or Adobe Acrobat, which allows you to save your documents as Certified PDF using an Enfocus PDF Queue. Or you can print to a PDF Queue in the form of a virtual printer.
- The PDF document can automatically be opened for review in Adobe Acrobat, Adobe Reader or any other PDF viewer.

For all of the above cases, you can specify what should happen with the respective interacting applications at the corresponding stage in the workflow.

To set the job processing preferences:

Choose **File** > **Preferences** > **Jobs Processing** on Windows, or **Instant PDF** > **Preferences** > **Jobs Processing** on Mac OS X, and follow the on-screen instructions.

See also:

- Creating and Editing PDF Queues
  > "QuarkXPress 7 or 8" on page 98
  > "Adobe InDesign CS3, CS4 or CS5" on page 100
  > "Adobe Illustrator CS3, CS4 or CS5" on page 102
  > "Virtual Printer" on page 103
  > "PostScript to PDF" on page 96
  > "Existing File" on page 105
- Creating Certified PDF Documents
  > "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35
  > "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36
  > "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
  > "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38
  > "Creating a Certified PDF Document from PostScript or PDF Files" on page 40
  > "Creating a Certified PDF Document by Printing to a Virtual Printer" on page 40

Preferences > Jobs Color Management

Color Management in a Nutshell

A color management system (CMS) is designed to reconcile the different color capabilities of input devices, e.g. a scanner or digital camera, and output devices, e.g. a printer or press, to ensure consistent color throughout the creation, display, and print process. Ideally, this means that the colors displayed on your monitor accurately represent the colors of the final output. It also means that different applications, monitors, and operating systems will display colors consistently.

Using ICC Profiles for Color Conversion

To eliminate, or at least minimize, color differences between devices, you can use ICC (International Color Consortium) profiles whenever color conversions are made during preflight and correction.

An ICC profile is a mathematical description of the color space used by a specific device. All objects in your PDF documents, i.e. text, graphics and images, can be associated, or "tagged", with an ICC profile for a given color space (Grayscale, RGB or CMYK).

You can select an ICC profile for each color space in the Instant PDF preferences. If you want to make separate settings for Images and other objects, select the "Use other settings for images than for objects. The pane underneath will then show two tabs, one for images and one for other objects.

However, you may also be using Preflight Profiles or Action Lists in which ICC profiles have been specified too. In that case, the ICC profiles in the respective Preflight Profiles or Action Lists will take precedence over those which you selected in the Instant PDF preferences.

To set the color management preferences:

1 Choose **File** > **Preferences** > **Jobs Color Management** on Windows, or **Instant PDF** > **Preferences** > **Jobs Color Management** on Mac OS X

2 If you want to make separate settings for Images and other objects, select the "Use other settings for images than for objects. The pane underneath will then show two tabs, one for images and one for other objects

3 Click the Enable Color Management check box.

4 Select Source ICC profiles for the color models of your choice.

5 If you want to use different ICC profiles for Target, enable the check box and select the Target icc profiles for the color models of your choice.

6 Select the CMM Engine you want to use.

See also:

- The ICC's Web site: www.color.org
- "Color Management" on page 92

Preferences > Jobs History

Limiting the Number of Jobs in the History List

You can limit the number of jobs that will be kept in the **History** list. You can specify:

- The maximum number of jobs that should be kept in the list
- The maximum number of days a job should be kept in the list

To set the preferences for jobs in the History list:

Choose **File** > **Preferences** > **Jobs History** on Windows, or **Instant PDF** > **Preferences** > **Jobs History** on Mac OS X, and follow the on-screen instructions.

See also:

- Managing Jobs > "Viewing Jobs" on page 76
- "Preferences > Jobs Location" on page 22

Preferences > Help Location

Multivolume Help Set

The Instant PDF Help Set consists of the **Enfocus Instant PDF Help,** presenting all the information in the User Guide as online Help topics.

You can select which version of the Help to use:

- The Help on your computer
- The Help on CertifiedPDF.net
- Choose automatically

The Preflight Report Help on CertifiedPDF.net will be updated regularly, so it might be recommended to select this option.

To set the preferences for the Preflight Report Help:

Choose **File** > **Preferences** > **Help Location** on Windows, or **Instant PDF** > **Preferences** > **Help Location** on Mac OS X, and follow the on-screen instructions.

See also:

- "Using the Instant PDF Help Set" on page 12

Preferences > Applications

Using Applications in Combination with Instant PDF

Instant PDF provides a plug-in or XTension for the following applications:

- QuarkXPress 7 and 8
- Adobe InDesign CS3, CS4 and CS5
- Adobe Illustrator CS3, CS4 and CS5
- Adobe Reader 8 or 9
- Adobe Acrobat 8 or 9

It uses the following versions of Acrobat Distiller for PDF creation:

- Acrobat Distiller 9
- Acrobat Distiller 8

For each of these applications, you can specify the location of their respective program files.

To set the preferences for applications:

Choose **File** > **Preferences** > **Applications** on Windows, or **Instant PDF** > **Preferences** > **Applications** on Mac OS X, and follow the on-screen instructions.

See also:

- Creating Certified PDF Documents > "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35 > "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36 > "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37 > "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38

Preferences > E-mail Server

SMTP Server Settings

You can configure a PDF Queue to deliver Certified PDF documents automatically by e-mail. If you do this, you must set the preferences correspondingly, i.e. fill in the host name, the port number, user name and password of the SMTP server for your outgoing e-mail. If no username and password is required, leave the fields empty.

For example:

- **Outgoing SMTP server**: mail-out.server.com
- **Port number**: 25

You can find this information in your e-mail program. When in doubt, contact your system administrator.

To set the e-mail preferences:

Choose **File** > **Preferences** > **E-mail Server** on Windows, or **Instant PDF** > **Preferences** > **E-mail Server** on Mac OS X, and follow the on-screen instructions.

See also:

- Creating and Editing PDF Queues > "E-mail" on page 112

Chapter 2

Chapter 2:
Creating Certified PDF Documents

About This Chapter

This chapter deals with the main task which you will be doing in Instant PDF: creating Certified PDF documents by using an Enfocus PDF Queue. It also gives you an insight into the PDF creation process with or without Instant PDF and explains what PDF Queues are.

Topics

In this chapter:

- Understanding the PDF Creation Process 30
- Creating PDF Documents the Conventional Way: Trial and Error 30
- Creating PDF Documents the Enfocus Way: the One-Step Process to an Output-Ready PDF File 32
- What Is an Enfocus PDF Queue? 33
- Viewing PDF Queues 33
- Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5 36
- Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5 37
- Creating a Certified PDF Document in QuarkXPress 7 or 8 35
- Creating a Certified PDF Document in Adobe Acrobat 8 or 9 38
- Creating a Certified PDF Document in Mac OS X 39
- Creating a Certified PDF Document from PostScript or PDF Files 40
- Creating a Certified PDF Document by Printing to a Virtual Printer 40

Understanding the PDF Creation Process

Different approaches towards the same ultimate goal

No matter how you create a PDF document, your ultimate goal will always be the same: you want to have an **output-ready** PDF document in **the most efficient way**.

"**Output-ready**" meaning that you, or the recipient of your PDF document, will be able to publish the PDF document, for example on the Web, in print, on CD-ROM or on whatever medium.

"**The most efficient way**" meaning that the PDF creation process is smooth, quick and easy. You want to spend (or waste) as little time as possible on:

- Specifying settings in various programs which ultimately define the quality of your PDF document
- Checking, reviewing, editing or even re-creating your PDF document to get it ready for output

You can achieve this goal by using Instant PDF to create your PDF documents. In order to use Instant PDF in the most efficient way, it is important that you have a good understanding of how PDF documents can be created and what happens "behind the scenes" in this process.

This section describes the two different PDF creation workflows:

- Creating PDF Documents the Conventional Way: Trial and Error
- Creating PDF Documents the Enfocus Way: the One-Step Process to an Output-Ready PDF File

Creating PDF Documents the Conventional Way: Trial and Error

Save as PDF

Let's consider the conventional way of creating PDF documents. Most applications today, for example word processors, desktop publishing programs, or graphic design software, have a **Save as PDF** function with which you can simply convert your source file to a PDF document.

Convert to Adobe PDF button

Some programs may even have a dedicated **Convert to Adobe PDF** button to do this. This button may look like this: . Thus, it may seem that creating PDF documents is a one-step process: you click the button or save your file as PDF. However, this is not always the case. What actually happens is that you print your document to a (temporary) PostScript file. This file is then taken to Acrobat Distiller and converted to a PDF file.

Creating PDF documents step by step

Some people do not use the **Convert to Adobe PDF** button or **Save as PDF** function and prefer the step-by-step approach:

1. Print the source file to a PostScript file.
2. They open this file in Acrobat Distiller and convert it to a PDF file.

This way of creating PDF documents is a multi-stage process with pitfalls rather than pitstops at every stage.

Conventional PDF workflow

When you create a PDF document, you do more than just creating it:

- You want to make sure that the PDF document is okay. Therefore, you also review your PDF document and try to correct any errors, if possible.
- When the PDF document looks okay, you "deliver" it, which can mean that you save it on a specific location or you send it to someone else.

A typical conventional PDF creation workflow goes as follows:

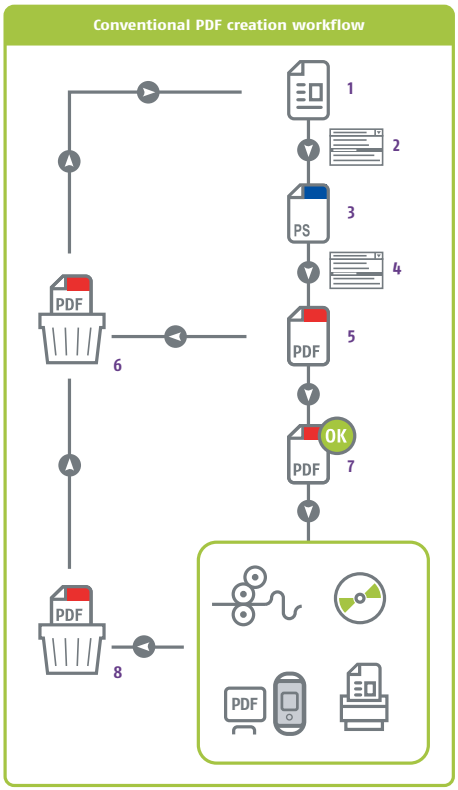
1 You create your source file in a native application, for example a word processor, a desktop publishing program or graphic design software.

2 In your native application, you select a PostScript printer from your list of printers and check its **Print Setup** properties (for example paper size and orientation, graphics resolution, scaling etc.). Acrobat Distiller using the AdobePS driver is an example of such a PostScript printer.

3 You print your source file to a PostScript file.

4 In Acrobat Distiller, you check and set **Job Options** or **Adobe PDF Settings** such as: graphics resolution and compression, PDF file compatibility, font embedding or subsetting, color settings. You select the PostScript file you have just created and convert it to a PDF file.

5 In Adobe Acrobat, you open and review the PDF document. You can check the PDF document visually to see if the document is ready for output. You may be able to detect some problems at a glance. For example, a font may look wrong in your PDF document or originally colored graphics may be converted to black and white. Some problems, however, cannot be detected visually, so there is no guarantee that your PDF document really is ready for output.



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- You may have to select a different printer driver to create a PostScript file with.
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Creating PDF Documents the Enfocus Way: the One-Step Process to an Output-Ready PDF File

Creating a Certified PDF Document in One Step

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Using Instant PDF, you create a Certified PDF document as follows:

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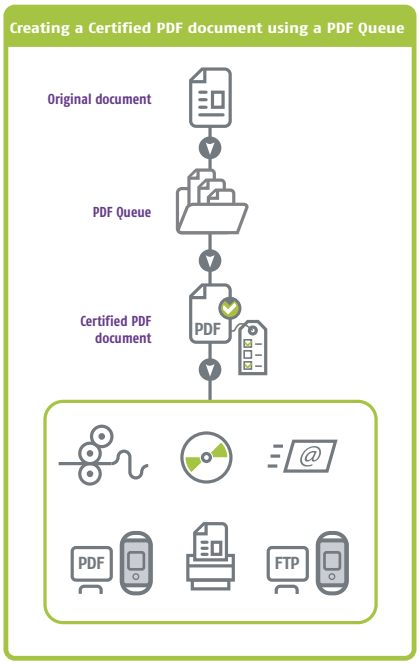
- Importing an existing PDF or PostScript file into Instant PDF



Processing steps

Creating a Certified PDF document by using an Enfocus PDF Queue means that you start a Certified PDF workflow, a complete process which occurs in the following steps:

1 **General > Author**: A Certified PDF workflow is started for the PDF document. Metadata is added to the PDF document: your name, company and contact details.

2 **PDF Creation**: The PDF document is generated.

3 **Processing > Correction**: The PDF document can be corrected using one or more Action Lists.

4 **Processing > Preflight**: The PDF document is preflighted using a Preflight Profile: various properties of the PDF document are checked and some of them can be fixed if they are incorrect.

5 **Processing > Review**: If necessary, you can review the PDF document in Adobe Acrobat or Adobe Reader.

6 **Delivery**: The PDF document is saved on a specific location and can automatically be sent to a recipient by e-mail or FTP.

What Is an Enfocus PDF Queue?

The Enfocus PDF Queue: a Complete Certified PDF Creation and Quality Assurance Workflow

An Enfocus PDF Queue is a complete Certified PDF creation and quality assurance workflow. You create an Enfocus PDF Queue in Instant PDF to convert your source documents to output-ready Certified PDF documents in a single step. "Output-ready" meaning according to predefined parameters provided by the PDF document receiver. The PDF Queue carries out all the intermediate steps of the PDF creation and quality assurance process automatically:

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See also:

- "Creating and Editing PDF Queues" on page 85
- "Using and Managing CertifiedPDF.net PDF Queues" on page 127

Viewing PDF Queues

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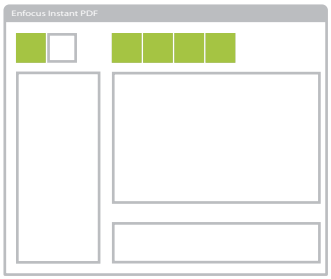

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See also:

- "Creating and Editing PDF Queues" on page 85
- "Managing PDF Queues" on page 119
- "Sorting PDF Queues in the PDF Queues List" on page 123
- "Using and Managing CertifiedPDF.net PDF Queues" on page 127

The PDF Queue Information Area

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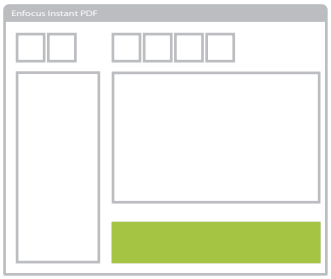

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See also:

- "The Instant PDF Documentation Set" on page 12

Creating a Certified PDF Document in QuarkXPress 7 or 8

What You Need to Do First

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See:

- Creating and Editing PDF Queues > "QuarkXPress 7 or 8" on page 98
- "Preferences > Applications" on page 26

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- "Preferences > Applications" on page 26

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- "Preferences > Applications" on page 26

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See also:

- "Preferences > Applications" on page 26
- Creating and Editing PDF Queues
  > "Virtual Printer" on page 103
  > "PostScript to PDF" on page 96

Creating a Certified PDF Document in Mac OS X

Printing to a Virtual Printer

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- "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
- "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38
- "Creating a Certified PDF Document by Printing to a Virtual Printer" on page 40

Creating a Certified PDF Document from PostScript or PDF Files

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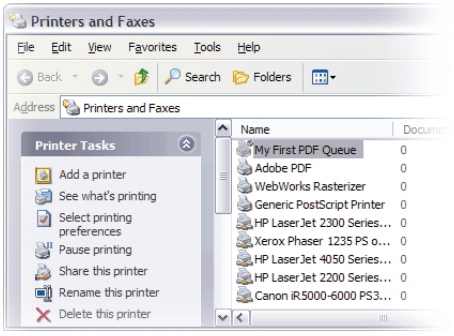

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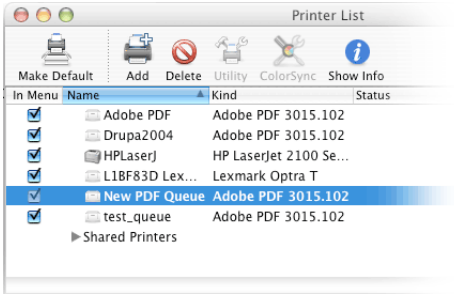

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Printing to a Virtual Printer

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4. Check the print settings which are specific to your native application, change them, if necessary, and click **Print**.

See also:

- "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35
- "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36
- "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
- "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38
- Creating and Editing PDF Queues > "Virtual Printer" on page 103

Chapter 3

Chapter 3: Preflighting PDF documents

About This Chapter

A Preflight Profile is a vital component of an Enfocus PDF Queue. The PDF Queue uses a Preflight Profile to "preflight" your PDF documents: check and correct errors, if any. The result of this check is presented in a preflight report.

This chapter explains these key concepts of preflighting and illustrates what happens in the preflight stage of your Certified PDF workflow.

Topics

In this chapter:

- Preflighting 46
- Preflight Profiles 46
- Preflight Report 47

Preflighting

Preflighting Defined

Preflighting is a term derived from the airline industry. The pilot has the responsibility to determine the airworthiness of the aircraft before take-off. This means that he or she has to perform a number of checks prior to each flight.

Preflighting PDF documents basically means the same thing: the "pilot in command", i.e. the person who creates or processes a PDF document, has to make sure that the document is "airworthy", or rather, "**outputworthy**", before delivering it.

"Outputworthy" means that the PDF document is "fit for use", for example:

- That a PDF document to be printed on a four-color offset press contains only CMYK colors and that all the necessary fonts are included
- That a PDF document intended for online viewing contains only RGB colors

Moreover, any property of a PDF document which does not meet the requirements of the Preflight Profile can be reported as a "problem" and some of them can be fixed in the same process.

Preflighting Mechanism

How exactly does preflighting work in an Enfocus PDF Queue? The preflight stage in the Certified PDF workflow typically goes like this:

1. The PDF document is submitted to a preflight check against a Preflight Profile.
2. A number of problems may be detected and some of those may be fixed automatically.
3. The detected and fixed problems are listed in a preflight report.

The next step in the workflow is the review stage. This is where you may take a look at the preflight report and visually inspect the PDF document.

See also:

- "Preflight Profiles" on page 46
- Creating and Editing PDF Queues > "Preflight" on page 108 > "Review" on page 109

Preflight Profiles

Preflight Profile: Key Component of a PDF Queue

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- Whether it should be checked or not
- How a deviating property in the PDF document should be listed in the preflight report: as **Information** or as **Error**

Moreover, some criteria also offer the option to fix deviating properties. For example, the Preflight Profile can automatically convert all RGB colors in the PDF document to CMYK.

Using Preflight Profiles

Using Preflight Profiles in Instant PDF simply means that you find an existing Preflight Profile and assign it to a PDF Queue. A PDF Queue always needs a Preflight Profile. Without a Preflight Profile, a PDF Queue can never be valid.

You cannot create or edit Preflight Profiles in Instant PDF. To do this, you need Enfocus PitStop Pro or Enfocus PitStop Server. Alternatively, you can download Preflight Profiles from our Web site.

See also:

- Creating and Editing PDF Queues > "Preflight" on page 108
- www.enfocus.com for information about Enfocus PitStop Pro or Enfocus PitStop Server
- www.enfocus.com/support/pdfprofilelist.php to download Preflight Profiles from our Web site

Preflight Report

Problem Severity Levels Defined

The result of a preflight check is presented to you in a preflight report. The preflight report is a PDF document which lists all the properties in the checked PDF document which did not comply with the settings as specified in the Preflight Profile. These deviating properties are not just reported, they also get labeled in the preflight report. The label indicates their respective severity levels.

In Preflight Profile:	Severity label in preflight report:	Meaning
Report as Information	Caution	The deviating property may not be a real problem in the strict sense of the word, but just something you should be informed about.
Report as Error	Error	The property really has to be as specified in the Preflight Profile. A PDF document with errors is not output-ready.
Fix this problem	Fixed	The problem has been resolved in the way specified in the Preflight Profile

Problem Severity Levels: Example

Suppose that some of your documents contain RGB colors. First, you want to create PDF documents using a PDF queue for proofing purposes, for example printing on a laser printer. This PDF Queue may use a specific PPD and a Preflight Profile for that particular output device. In that case, RGB colors are not really a problem. However, you would like to know which PDF documents contain objects or text in RGB color, because at a later stage, you might want to print these documents on an offset press. You could then use two distinctive Enfocus PDF Queues with different Preflight Profiles to create and preflight these PDF documents:

- A PDF Queue with a Preflight Profile for the laser printer, which reports RGB colors as **Information**
- A PDF Queue with a Preflight Profile for the color press, which reports RGB colors as **Error**

See also:

- "Duplicating a PDF Queue" on page 122

Viewing a Preflight Report

You can view the preflight report in the review stage of the Certified PDF workflow. If the checked PDF document has deviations from the Preflight Profile, the preflight report can be displayed automatically on top of the PDF document itself.

See also:

- Managing Jobs > "Reviewing a PDF Document" on page 82
- Creating and Editing PDF Queues > "Review" on page 109

Interpreting Preflight Reports

Report Chapters

The preflight report generated by Instant PDF is a PDF document that consists of the following chapters:

Chapter	Contents
Errors & Warnings	(potential) problems according to the selected Preflight Profile
General File Information	information about the current PDF document, such as title, author, profile used, data format, etc.
Certified PDF Workflow Information	information about when the Certified PDF workflow was started, the Preflight Profile that was used to preflight the PDF document and whether the Preflight Profile of the PDF Queue was identical to the Preflight Profile of the Certified PDF document, if any
Font Information	all fonts used in the PDF document, along with their attributes (type of font, embedded or subset, etc.)
Color Information	all color spaces (RGB, CMYK, etc.) used in the PDF document, with additional information where required

Chapter	Contents
Image Information	all images in the PDF document, along with additional information (e.g. physical and effective resolution, page, angle, custom color functions, etc.)
OPI Information	OPI usage in the PDF document

Using the Preflight Report: Hyperlinked Symbols

The preflight report lists all the properties in the checked PDF document that deviate from the settings in the Preflight Profile. Of course, it's nice to be informed about (potential) problems, but you can do more with the preflight report: you can actually use it for troubleshooting purposes.

The entries in the preflight report are not only preceded by a severity label (**Error**, **Caution** or **Fixed**), but also by the following hyperlinked symbols:

Symbol	Meaning and usage
	Click this symbol to view the online help topic about this particular problem. You will find a detailed description of the cause of the problem and instructions how to resolve it or prevent it in the future.
	Click this symbol to view the first object or text in the PDF document which has this deviating property.

See also:

- Managing Jobs > "Reviewing a PDF Document" on page 82
- "Working with Certified PDF documents" on page 61

Chapter 4

Chapter 4: Using Action Lists

About This Chapter

You can add Action Lists to your PDF Queues to automate corrections or changes in PDF documents. This chapter explains what Action Lists are and how and why you use them. It also gives you an idea of how Action List can work in practice.

Topics

In this chapter:

- Definition and Purpose of an Action List 52
- Action Types 53
- Action Lists in Practice 55
- Further Automation 57

Definition and Purpose of an Action List

What Is an Action List?

An Action List is a series of Enfocus actions grouped together as a single command to carry out tasks automatically in a PDF document. It is similar to a "macro" in other applications.

The Enfocus actions include:

- Selecting objects (for example color, fonts, images etc.)
- Changing, adding or removing objects
- Checking properties in a PDF document
- Gathering information in a PDF document

To create Action Lists, you need Enfocus PitStop Pro but you can include one or more existing Action Lists in your Enfocus PDF Queue. Alternatively, you can also download Action Lists from our Web site.

See also:

- "Action Types" on page 53
- Creating and Editing PDF Queues > "Correction" on page 106
- www.enfocus.com for information about Enfocus PitStop Pro
- www.enfocus.com/support/actionlistlib/actionlist-index.php to download Action Lists

Why Would I Use Action Lists?

The main reasons why you would use Action Lists in an Enfocus PDF Queue are:

- You do not use Enfocus PitStop Pro to edit your PDF documents.
- You want to prevent repetitious PDF editing tasks.
- You want to integrate the correction of PDF documents in your PDF creation workflow.

Indeed, creating a PDF document usually isn't enough. You will most likely review the result and you may have to make some corrections to make the PDF document ready for output. But you may not have the required software at your disposal to edit PDF documents.

Or maybe you do have PDF editing tools, but there may be sequences of tasks which you have to do a number of times, either within a single PDF document or in multiple PDF documents. To prevent these repetitious tasks, you can use one or more Action Lists. Moreover, you can integrate these Action Lists into your Enfocus PDF Queues to make sure that corrections are done in your PDF documents automatically before these documents are submitted to a preflight check.

See also:

- Creating and Editing PDF Queues > "Correction" on page 106.

Action Types

Why Do I Have to Know What Action Types Are?

In Instant PDF, you can just use one or more Action Lists by integrating them into your PDF Queues, but you cannot create or change them. To do this, you need Enfocus PitStop Pro.

Still, it is important that you understand:

- What an Action List can do
- What types of actions can be included in an Action List
- Which action types can be used in Action Lists for PDF Queues and which cannot

What Are Action Types?

Typically, you use an Action List to select something in the PDF document and to change it into something else.

For example, you select the spot color "Company Green" and change it into "Company Gray". You do this throughout the complete PDF document but you also want to do this in other PDF documents.

However, an Action List can do a lot more. It can include the following types of actions:

- Selections: Selecting objects (for example color, fonts, images etc.)
- Changes: Changing, adding or removing objects
- Checks: Checking properties in a PDF document
- Informs: Gathering information in a PDF document

A Look Inside an Action List in Enfocus PitStop Pro

An Action List consists of a series of actions. to see how actions are presented, arranged by type.

When creating or editing an Action List in Enfocus PitStop Pro, all actions will be arranged by type, so they can easily be found.

Selections

Before you can change something in a PDF document, you evidently have to select it. Anything which can be selected in a PDF document is listed in the **Selections** category, together with the logical operators "AND", "NOT, "OR".

Changes

The list of changes includes almost anything which professional PDF editing tools like Enfocus PitStop Pro can do, including:

- Adding objects, or page numbers
- Changing a wide variety of properties, including page boxes
- Color conversions
- Removing objects
- Rotating and scaling page contents
- Font- and color-related changes

Checks

Action Lists do not necessarily change PDF documents. They can also be created to check various properties in PDF documents or detect specific objects or elements. For example, an Action List can check font-related properties or detect empty pages in a PDF document.

Checks, however, are not allowed in Action Lists which you wish to integrate into PDF Queues because PDF documents which are processed through an Enfocus PDF Queue are always submitted to a preflight check by a Preflight Profile. In other words, the following principles are applied in a PDF Queue:

- An Action List in a PDF Queue can only select and change properties in a PDF document.
- It is the Preflight Profile that checks the properties of a PDF document and fixes problems, if any.

If an Action List in a PDF Queue contains checks, they will be ignored and you will see a corresponding message appearing when the PDF document reaches the correction stage in the Certified PDF creation workflow.

Informs

Action Lists can also gather information in PDF documents. This can be information about fonts, colors, OPI, etc. The corresponding chapters will be included in the preflight report.

See also:

- "Definition and Purpose of an Action List" on page 52

Action Lists in Practice

Practical examples of Action Lists

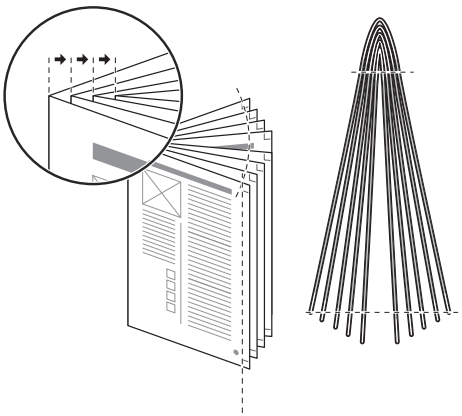
Let's take a look at a couple of examples of Action Lists. The purpose of these examples is to give you an idea of how Action List work in practice.

The examples are the following:

- Compensate for Creep
- Add Printer Marks

Compensate for Creep

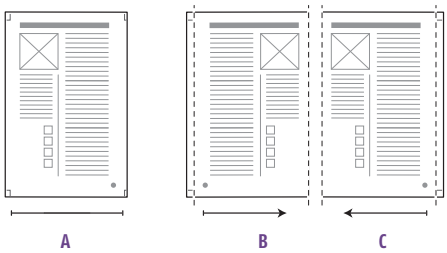
Suppose you have PDF documents of booklets that are almost press-ready. The page are to be printed double-sided, folded and trimmed. You want to make sure that the page numbers, which are close to the edge of the page, do not get trimmed off. Indeed, when pages are folded for saddle-stitch binding, the printed area slightly moves outward. This is known as **creep** in the publishing world. The more pages in a booklet, the larger the shift of the area of the inner pages will be.



Creep moves the printed area of the inner pages outwards, which may cause page numbers near the outer edges of the pages to be trimmed off.

To compensate for this creep, you can integrate an Action List in your PDF Queue. This Action List can do the following:

- Shift the printed area of the left-hand (even-numbered) pages 5 mm to the right (closer to the binding).
- Shift the printed area of the right-hand (odd-numbered) pages 5 mm to the left (closer to the binding).
- Leave the first page unchanged (e.g. because this page is not numbered).



Changing the page layout: move the printed area of the inner pages (**B** and **C**) towards the binding to compensate for creep, but leave the first page (**A**) unchanged.

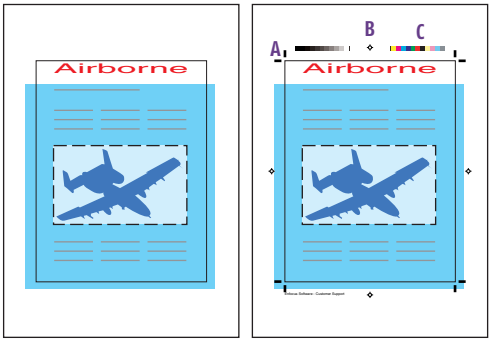
Add Printer Marks

Suppose you want to create PDF documents which have printer marks, such as:

- Trim marks
- Registration marks
- Color control strips

Some professional authoring, DTP or publishing software programs enable you to print your documents with printer marks. Others, however, don't. Or sometimes, you receive PDF documents which have been generated without any trim marks, registration marks or color control strips.

In situations like these, you can simply add printer marks automatically to your PDF documents by integrating an Action List in your PDF Queue.



1. Original (PDF) document without any printer marks.

2. PDF document in which an Action List has been run to add trim marks (**A**), registration marks (**B**) and color control strips (**C**).

Further Automation

As explained in "Definition and Purpose of an Action List" on page 52, you can use Action Lists to automate repetitious tasks. You can integrate these Action Lists into your PDF Queue so that all the PDF documents which are created through this PDF Queue are automatically corrected.

But, if you have a large number of existing PDF documents to which you want to apply the same Action List(s), you may feel the need for further automation. Indeed, you would repeatedly have to:

- Open each individual PDF document
- Execute one or more Action Lists
- Close and save the PDF document

Consequently, the task of running Action Lists in itself may become repetitious and may thus be eligible for automation.

Enfocus PitStop Server offers further automation of PDF processing tasks. It is a stand-alone application which you can use to create so-called **Hot Folders**. In these **Hot Folders**, you can include one or more Action Lists and a Preflight Profile. The Preflight Profile and Action List(s) will be executed automatically as soon as PDF documents arrive in an input folder which you have selected.

Enfocus LightSwitch, Enfocus FullSwitch and Enfocus PowerSwitch offer even further automation. All the functionality is driven by a visual flow editor and supported by the robust automation tools that are at the core of all Switch products.

More information about Enfocus PitStop Server and the Enfocus Switch products is available on our Web site at www.enfocus.com.

Chapter 5

Chapter 5:
Working with Certified PDF documents

About This Chapter

This chapter covers all aspects of Certified PDF in Instant PDF, ranging from a detailed explanation on the advantages of a Certified PDF workflow to how you can create new Certified PDF documents using Instant PDF.

Topics

In this chapter:

- About Certified PDF 62
- Guaranteed Preflighting 62
- Document Consistency 64
- Responsibility 65
- The Certified PDF Workflow Explained 66
- What Is an Enfocus Certified PDF Document? 67
- Certified PDF User Identification 67
- Certified PDF Document Status 68
- Starting a Certified PDF Workflow for a PDF document 68
- Checking the Certified PDF Status of a PDF Document 70
- Viewing the Preflight Report of a Certified PDF Document 71
- Viewing the Edit Log File 71
- Viewing the Editing Sessions 72

About Certified PDF

What is Certified PDF?

Certified PDF is a PDF workflow concept developed by Enfocus based on customer requests and feedback from industry experts.

Three vital issues solved

The Certified PDF concept has been designed to address three fundamental issues faced by the majority of users implementing a PDF workflow:

- How to guarantee that a PDF document was successfully preflighted with a specific Preflight Profile.
- How to maintain consistency between the source document(s) and the PDF document when (minor) changes can be applied to the PDF document throughout the workflow.
- How to minimize risk and have certainty about responsibility when changing a customer's PDF document before final output.

See also:

- "Guaranteed Preflighting" on page 62
- "Document Consistency" on page 64
- "Responsibility" on page 65

Guaranteed Preflighting

Preflighting Issues

"Preflighting" is the process of checking a PDF document against various criteria to ensure that the PDF document meets all the requirements for output or publication. Typically, the criteria vary depending on the output or publishing process. A set of criteria matching the requirements of a particular process is called a Preflight Profile.

Using Preflight Profiles

Enfocus PitStop Pro and Enfocus PitStop Server, for example, allow you to create a Preflight Profile that checks your PDF document against various criteria, such as color and font usage. Moreover, you can use the Preflight Profile to actually fix detected problems in your PDF documents.

Preflighting and Your Workflow

Ideally, a PDF document should be preflighted at an early stage in a workflow, i.e. as soon as it has been created. This is particularly true if the PDF document will move from the PDF document provider, who created the PDF document, to the PDF document recipient, e.g. a publishing or printing department. Detecting problems in the PDF document before the file leaves the PDF document provider saves time (and money). Even more so, when the PDF file is sent to a different physical location.

Preflighting in a Certified PDF workflow

A Certified PDF workflow supports the preflight process by:

- Offering the PDF document **provider** a simple and streamlined way to preflight a PDF document with a Preflight Profile supplied by the PDF document **recipient**.
- Including the Preflight Profile and the corresponding preflight report in the PDF document. This way there can be no doubt about the preflight status of the PDF document.

- Offering a straightforward user interface that enables the recipient of the PDF document to verify that the document has been preflighted successfully with a Preflight Profile he or she provided.

The above-mentioned features help to:

- Motivate the PDF document provider to actually preflight his or her PDF documents
- Dramatically reduce the number of problems in files received from PDF document providers

See also:

- "Document Consistency" on page 64
- "Responsibility" on page 65
- "The Certified PDF Workflow Explained" on page 66

Document Consistency

PDF editing Issues

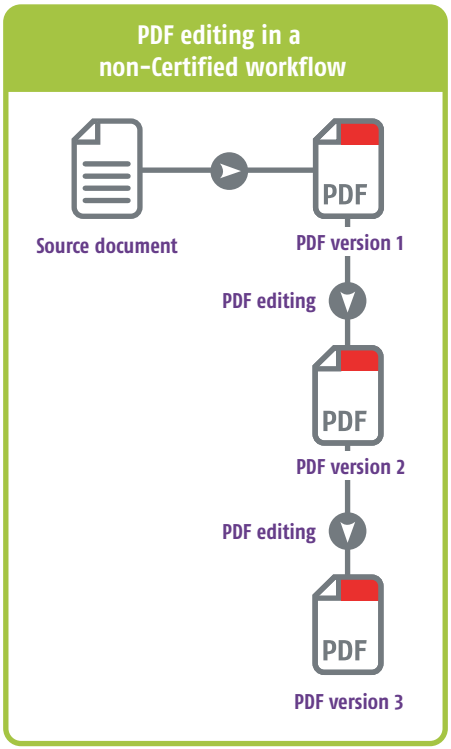
PDF editing tools, such as Enfocus PitStop Pro, are very convenient for making intermediate or last-minute corrections in PDF documents. This saves you both time and money because you do not have to go back to the original application program to re-create the PDF document. Sometimes, it may even be more efficient to make the changes directly in your PDF document. Enfocus PitStop Pro, for example, allows you to make global color changes throughout your PDF document.

Risks Involved in PDF Editing

PDF editing also involves a risk: as soon as you edit and save a PDF document, you create a version of a document that is different from the original document you made using a word processor or a desktop publishing software. These inconsistencies are hard to manage, and may introduce problems in archiving or when the document is republished at a later date.

Conventional PDF editing

In a conventional PDF workflow, the PDF document goes through the hands of different parties who can each edit it, if necessary. The original PDF document is replaced by the edited one, and there is no efficient means of tracing which changes were made between the different versions of the file, or by whom.



PDF Editing in a Certified PDF Workflow

To help reduce document consistency problems, the Certified PDF workflow features a mechanism that:

- **Logs all the changes** that are made to a Certified PDF document
- **Stores these changes** inside the Certified PDF document
- **Makes sure a new preflight check is run** after editing to guarantee that the PDF document is still output-ready

Introducing the Edit Log

Based on the logged information, an **edit log** —a human readable preflight report— is generated.

If consistency between the PDF document and the source file(s) is very important, you can use the edit log to change the source file(s) accordingly.

Source file references

To assist in this process, a Certified PDF document can also keep a **reference to the source file(s)** from which the PDF document was created. You can use this reference to make sure that the source file has not been edited since the PDF document was created.

See also:

- "Guaranteed Preflighting" on page 62
- "Responsibility" on page 65
- "Viewing the Edit Log File" on page 71

Responsibility

Responsibility Issues

In addition to causing inconsistencies, changing a PDF document that was created by someone else can create ambiguity about who is ultimately responsible for the final result.

Many printers, service providers, etc. are extremely reluctant to make any changes to their customer's documents for fear of having to assume responsibility if anything goes wrong. This includes issues that can be totally unrelated to the small correction applied.

Responsibility in a Certified PDF workflow

The Certified PDF workflow settles responsibility issues by:

- Providing a detailed **log file** of all the changes made to a PDF document
- Keeping track of the PDF editing process, i.e. who applied which change and when
- Implementing a robust **roll-back mechanism** which, if you wish, allows you to easily return to a previously saved state —a "snapshot"— of your PDF document
- Offering the possibility to **compare** any two of these snapshots visually to detect and examine the differences.

You need Enfocus PitStop Pro to use the roll-back mechanism and the visual compare functions. However, even if you cannot use these functions, other persons who view or edit the Certified PDF document later on in the workflow can still make use of them to review the changes made.

See also:

- "Guaranteed Preflighting" on page 62
- "Document Consistency" on page 64
- "Viewing the Edit Log File" on page 71

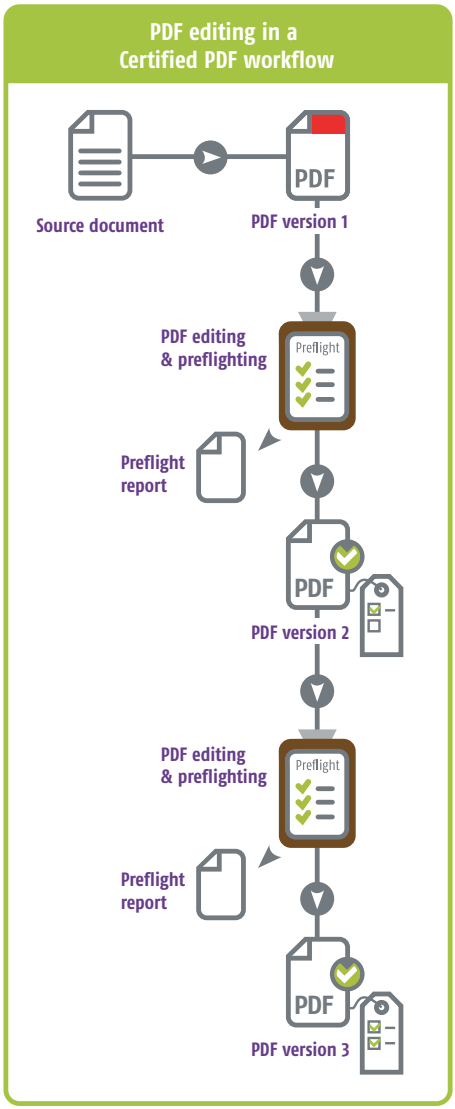
The Certified PDF Workflow Explained

Principles of a Certified PDF Workflow

The Certified PDF workflow is based on the following principles:

- Guaranteed preflighting
- The Incremental save principle
- A robust Roll-back mechanism

The illustration shows how a PDF document is preflighted and becomes a Certified PDF document after each editing session.



Incremental save

In the Certified PDF workflow, all the modifications done in a Certified PDF document are logged per session and saved in an edit log file. Also, the edited Certified PDF documents can be saved incrementally. This means that the changes done in version 3, for example, are saved "on top of" the changes done in version 2 but you keep one physical PDF file.

Thanks to the incremental save principle, the file size of your Certified PDF document does not increase drastically as it is edited further on in the workflow. Adobe Acrobat only saves the changes made during the different sessions.

Roll-back mechanism

The Certified PDF workflow also offers you a robust roll-back mechanism. Each time someone edits your Certified PDF document at a later stage, for example using Enfocus PitStop Pro, a "snapshot" will be included in the file. You may think of a snapshot as an "image" of the state of the PDF document at the time it was saved. This allows the user to any previous stage in the Certified PDF workflow and to compare different versions of your PDF document, even though he or she maintains one physical PDF file.

See also:

- "What Is an Enfocus Certified PDF Document?" on page 67
- "Starting a Certified PDF Workflow for a PDF document" on page 68

What Is an Enfocus Certified PDF Document?

Introducing Metadata

Any regular PDF document contains metadata, i.e. information about the document itself. The Document Summary dialog box of Adobe Acrobat, for example, contains metadata such as:

- Title, subject and author of the PDF document
- Creator: The native application in which the original document was created
- Producer: the printer driver with which the PDF document was generated
- PDF version
- Page size

Certified PDF Metadata

An Enfocus Certified PDF document can be enriched with the following metadata:

- A reference to one or more source documents on which the PDF document was based
- A Preflight Profile
- A preflight report
- User and system identification
- An edit log, listing all the changes done in the PDF document per editing session (the time in which the PDF document was opened, edited and saved)
- A session comment

See also:

- "About Certified PDF" on page 62
- "The Certified PDF Workflow Explained" on page 66

Certified PDF User Identification

An Enfocus Certified PDF document can contain two types of user identification:

- Personal Information
- System Information

Each of these serves its own purpose.

Personal Information

The personal information includes your name and company contact details, together with a message, if any.

This information allows people to reach you if they should have any questions about your edit or preflight actions done in the PDF document.

System Information

The system information consists of the details of the person who registered Instant PDF and information taken from your operating system, network and computer.

This information cannot be changed and is therefore a reliable source to pinpoint responsibility, for example. If people claim or disclaim responsibility for a given change made in the PDF document, the system information will provide incontestable proof. This information will be used in the edit log to show who made which changes in a given session.

To change or view your personal information:

1. In the Instant PDF main window, choose **File** > **Preferences** > **Personal Information**.
2. If required, fill in your personal information and click **OK** to save the changes.

See also:

- "Viewing the Edit Log File" on page 71

Certified PDF Document Status

The Status Button

Instant PDF adds a dedicated Certified PDF status button to the **File** toolbar in Adobe Acrobat and Adobe Reader.

This buttons indicates the status of the document and allows you to view more detailed information.

Statuses Explained

This button changes depending on the status of the PDF document that you are working with:

Button	Meaning
	The current PDF document is not a Certified PDF document.
	The current PDF document is a Certified PDF document which was successfully preflighted, meaning that the PDF document does not contain any errors. Click this button to see the document status.
	The current PDF document is a Certified PDF document which was not successfully preflighted. Possible causes are: • The PDF document contains errors. or • The Certified PDF Profile embedded in the PDF document does not match a Preflight Profile in the Preflight Profiles database, i.e. the ones which you see listed in the **Enfocus Processing – Preflight panel**. The corresponding Preflight Profile in the Preflight Profiles database may have been changed or removed. Click this button to see the document status.

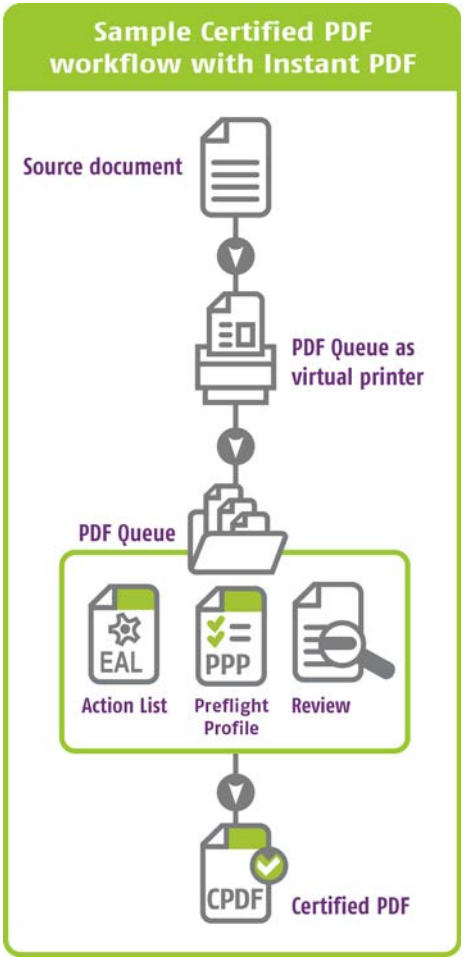
See also:

- "What Is an Enfocus Certified PDF Document?" on page 67
- "The Certified PDF Workflow Explained" on page 66
- "Checking the Certified PDF Status of a PDF Document" on page 70

Starting a Certified PDF Workflow for a PDF document

Creating Certified PDF Documents with Instant PDF

When you create a new PDF document using one of the options available in Instant PDF (such as the Adobe InDesign, Adobe Illustrator or QuarkXPress plug-ins or using a virtual printer), you automatically start a Certified PDF workflow for that document.



Existing PDF Documents

You can also bring existing PDF documents into a Certified PDF workflow.

Starting a Certified PDF workflow for a PDF document means that you 'stamp' the document: You provide it with the information necessary to enjoy the benefits of the Certified PDF workflow for that particular PDF document.

As soon as you have started a Certified PDF workflow for a document, any change made to the document will be "recorded" per editing session and can be traced in the edit log. See also "Viewing the Edit Log File" on page 71.

To start a Certified PDF workflow for an existing document if you do not have Adobe Acrobat:

1 In the Instant PDF main window, click the **Jobs** button on the toolbar.

2 Choose **Job** > **New**.

you can also drag and drop a PostScript or PDF file onto the Instant PDF application icon or its shortcut. Instant PDF will then start automatically and start a job to convert the PostScript or PDF document to a Certified PDF document

3 Browse to the PDF document that you want to make Certified, select it and click **OK**.

The file appears as a job in the **Jobs in Progress** list.

4 Select the job in the **Jobs in Progress** list and click the **Select PDF Queue** button.

5 Select a PDF Queue and click **OK**.

The job is processed and you can follow the progress in the **Job Information** area.

6 If required, complete any additional actions prompted by the PDF Queue in the **Job Information** area (e.g. specifying an output file name, or reviewing the document).

Once the job finishes successfully, the output file is a Certified PDF document.

To start a Certified PDF workflow for an existing document from Adobe Acrobat:

1 Open the document in Adobe Acrobat.

2 Choose **File** > **Save as Certified PDF**.

3 Select a PDF Queue and click OK.

The document is submitted to Instant PDF as a new job. Carry out the required actions (if any) that appear in the Job Information area (e.g. file naming or reviewing).

See also:

- "About Certified PDF" on page 62
- "The Certified PDF Workflow Explained" on page 66
- "Job Processing Explained" on page 78
- "Creating a New Job" on page 78
- "Reviewing a PDF Document" on page 82

Checking the Certified PDF Status of a PDF Document

Viewing the Status

Instant PDF enables you to check the Certified PDF status of a document and its associated Preflight Profile.

The overall Certified PDF status of your documents is dependent on the Preflight Profile status.

To check the status of a document:

1 Open the PDF document in Adobe Acrobat.

2 Click the **Status** button (or depending on the status of the document) on the **File** toolbar.

The Enfocus Certified PDF Status dialog box appears.

Status information

The **Status** tab of the Enfocus Certified PDF Status dialog box gives you the following information:

- The name, author and date of the Certified Preflight Profile
- The status of the Certified Preflight Profile
- The status of the Certified PDF document

Certified Preflight Profile Statuses

Instant PDF determines the status of the Preflight Profile that is embedded in the PDF document by comparing it to the Preflight Profiles in your Preflight Profile database, which are the ones which you see listed in the **Enfocus Processing – Preflight panel**.

The embedded Certified Preflight Profile can either match one of the Preflight Profiles in the Preflight Profiles database, or not.

The Preflight Profiles match when the following conditions are met:

- Preflight Profiles created with earlier versions of Enfocus PitStop Pro must have the same settings, except for differences between Do and Do & Log.
- Preflight Profiles created with the current version of Enfocus PitStop Pro must have the same settings for **Problems to detect** and **Report as**. Different settings for fixes are not taken into account.

The Certified Preflight Profile can have either one of the following statuses:

- It matches a Preflight Profile in the Preflight Profile database.
- It does not match any of the Preflight Profiles in the Preflight Profile database. The reason can be, for example, that there is simply no Preflight Profile with the same name in the Preflight Profile database or that the settings of the Preflight Profile are different.

The Preflight Profile database consists of all the Preflight Profiles used in PDF Queues on your system. If you also have Enfocus StatusCheck installed, any Preflight Profiles in the StatusCheck folder are also taken into account.

Certified PDF Document Statuses Explained

The status of your Certified PDF document can be one of the following:

- Your PDF document is not a Certified PDF document because **no Preflight Profile is attached** to it.
- Your PDF document has an attached Preflight Profile but has **not been preflighted** yet, or it was changed since the time it was last preflighted.
- Your PDF document has been preflighted but the **Preflight Report contains errors**.
- Your PDF document has been **successfully preflighted**.

See also:

- "Certified PDF Document Status" on page 68
- "Viewing the Preflight Report of a Certified PDF Document" on page 71
- "Viewing the Edit Log File" on page 71

Viewing the Preflight Report of a Certified PDF Document

Text Version

All Certified PDF documents contain information about the last time the document was preflighted. This information is stored as a text-only version of the Preflight Report, listing all the Error, Warning and Fixed messages that were generated during the preflight.

This allows you to check the contents of a document after it was created and preflighted, without having to run the Preflight Profile again.

When you create a PDF document using Instant PDF, you have access to the PDF version of the Preflight Report, which contains far more information and links to the Preflight Report Help. It is recommended to use this version if you have the ability to view the report as a PDF document.

You can use the text version if you only have StatusCheck installed.

Viewing the Preflight Report

To view the text version of the Preflight Report for a Certified PDF document:

1 Open the Certified PDF document in Adobe Acrobat.

2 Click the **Status** button (or depending on the status of the document) on the **File** toolbar.

The Enfocus Certified PDF Status dialog box appears.

3 Click the **Preflight Report** tab.

See also:

- "Guaranteed Preflighting" on page 62
- "Preflight Report" on page 47

Viewing the Edit Log File

All Edits Are Logged

The Certified PDF mechanism in Instant PDF keeps a record of every editing session of a Certified PDF document. Thus, all the changes made to the PDF document are logged chronologically in the PDF document.

Logging Methods

The changes can be logged in two different ways, depending on the tool they were made with:

- If you edit your PDF document with any of the Enfocus Certified PDF compliant plug-ins, such as Enfocus PitStop Pro, the changes are immediately saved in the Edit Log. The Edit Log will contain a detailed entry for each of the changes.
- If you edit your PDF document with non-compliant third-party PDF editing tools, Instant PDF will intercept and log them. However, the Edit Log file will contain no details on the changes nor on the product with which the changes were made.

Viewing the Edit Log

To view the Edit Log for a Certified PDF document:

1 Open the PDF document in Adobe Acrobat.

2 Click the **Status** button (or depending on the status of the document) on the **File** toolbar.

The Enfocus Certified PDF Status dialog box appears.

3 Click the **Edit Log** tab.

The Edit Log appears, displaying a list of the edits that were performed in the document.

Interpreting the Edit Log

Depending on the product that was used to perform the edits on the Certified PDF document, the edit log will display more or less information. Typically, the edits are recorded in the following format:
"Product abbreviation: Edit Description (Page #)"

For example, if somebody deleted an image using Enfocus PitStop Pro, the following message might appear in the Edit Log:
"PP: Remove Selection (Page 5)"

The following abbreviations are used to identify the Enfocus products in the Edit Log:

- IP: Instant PDF
- PP: PitStop Pro
- CW: Enfocus Certified PDF
- PS: PitStop Server
- PEX: PitStop Extreme
- PCO: PitStop Connector

Viewing the Editing Sessions

About Sessions

The Certified PDF mechanism in Instant PDF allows you to consult the **history** of your PDF document.

This means that you can view a chronological list of all the editing sessions that your Certified PDF document has run through. A session comprises all the changes that were made between two saves of the document.

The Sessions List

The chronological list of sessions contains the following information:

- The Certified PDF product that "stamped" the session.
- The person or company responsible for the session.
- The end date and time of the session.

To view the list of editing sessions:

1 Open the PDF document in Adobe Acrobat.

2 Click the **Status** button (or depending on the status of the document) on the **File** toolbar.

The Enfocus Certified PDF Status dialog box appears.

3 Click the **Sessions** tab.

The Sessions list appears, displaying the document history.

Chapter 6

Chapter 6: Managing Jobs

About This Chapter

This chapter explains how you can control the PDF creation process in Instant PDF, using the jobs.

Instant PDF organizes the documents you submit to it in a Job List, and it is by managing the jobs in this list that you can exert even more control over the creation process.

Topics

In this chapter:

- What is a Job? 76
- Viewing Jobs 76
- Job Processing Explained 78
- Creating a New Job 78
- Canceling a Job 79
- Pausing and Resuming a Job 80
- Deleting a Job 80
- Saving PDF Files and/or Jobs 81
- Reviewing a PDF Document 82

What is a Job?

Visualizing the PDF Creation Process

Whenever you create a PDF document using Instant PDF, a new **Job** is created.

A Job represents the entire set of actions that occur when you use Instant PDF to generate a Certified PDF document. It is your primary means of managing the PDF creation process.

Working with Jobs

The Jobs you submitted to a PDF Queue are displayed in the Job List View. Jobs give you more control over the PDF creation process:

- You use them to follow the progress of the different steps in the PDF creation process.
- You use them to pause or cancel the PDF creation process if required.

See also:

- "Viewing Jobs" on page 76
- "Creating a New Job" on page 78
- "Canceling a Job" on page 79
- "Pausing and Resuming a Job" on page 80

Viewing Jobs

About the Job List

The Job List is one of the two views of the main Instant PDF window. You see the Job list when:

- You start a new Job
- You choose **Job** > **Show Job List**
- You click the **Jobs** button in the toolbar

You can use the Job List to see information about the Jobs that are in progress or jobs that have been processed recently.

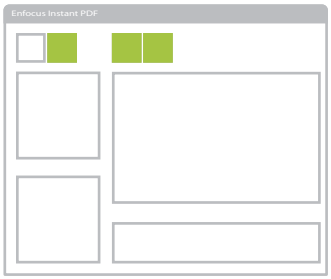
Components of the Job List

The Job list consists of the following components:

- The Job Control Buttons
- The Job List
- The Job Information Area
- The Help Area

The Job Control Buttons

You find the Job control buttons on the toolbar when you are viewing the Job list.



You can use these buttons for commonly used tasks:

Button	Usage
PDF Queues	Click the **PDF Queues** button to see the PDF Queue list. See: "Viewing PDF Queues" on page 33
Jobs	Click the **Jobs** button to see the Jobs lists.
Pause	Click the **Pause** button to interrupt the processing of a job temporarily. See: "Pausing and Resuming a Job" on page 80
Resume	Click the **Resume** button to resume the processing of a paused job. See: "Pausing and Resuming a Job" on page 80
Cancel	Click the **Cancel** button to stop processing the job permanently. The canceled job will move to the **History** list. See: "Canceling a Job" on page 79

The Job List

You find the **Job** list at the left-hand side of the main Instant PDF window.

The Job list is split into two separate lists:

- The **Jobs in Progress** list contains the jobs which are currently being processed and jobs which have been paused. You can click a job in this list to see its progress.
- The **History** list contains the finished jobs and jobs which have been canceled. You can click a job in this list to see whether it has been completed successfully or not (failed).

The Job Information Area

You find the Job information area to the right of the Job list.

This is where you can see details on the selected Job. These can include:

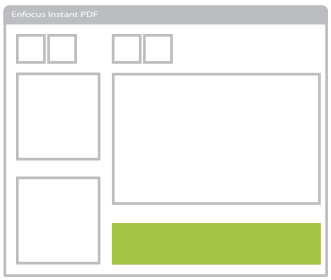
- Basic information about the job, such as its name
- The job's current step in the workflow
- Any actions you need to take

See also:

- "Reviewing a PDF Document" on page 82

The Help Area

You find the **Help** area at the bottom of the main Instant PDF window.



The **Help** area gives you brief, specific instructions or background information about the buttons or options where you rest the mouse pointer on. You can access the corresponding **Help** topic for more information by clicking the **Help** button (?).

See also:

- "The Instant PDF Documentation Set" on page 12

Job Processing Explained

Processing Steps

A processing step indicates the current stage of the PDF creation process.

When a job is being processed, you can see its progress in the Job Information area. If the PDF Queue for that particular job is known, you can also see the job's current processing step and the total number of steps.

For example, the Job Information area might display: "Step 2 of 4: Preflighting".

The settings in the PDF Queue determine which steps are included in the PDF creation process.

Steps Requiring an Action

Most jobs do not require any further actions on your part — jobs you submit are automatically processed by Instant PDF.

However, certain PDF Queues may require you to perform one or more actions before the job can finish. For example, you may have to specify a file name for the resulting PDF document, indicate which PDF Queue needs to be used, or review the PDF document.

In this case the Job Information area displays the instructions you need for completing the action.

Creating a New Job

Different Job Creation Methods

You can create new jobs:

- Directly from within the Instant PDF window, using the **New** command in the Job List view. See Creating Jobs from the Job List view.
- Directly by dragging a PostScript or PDF file onto the Instant PDF application icon or its shortcut.
- Indirectly by printing to a virtual printer, or using the QuarkXPress XTension or the plug-in for Adobe InDesign, Adobe Illustrator or Adobe Acrobat.

See also:

- Creating Certified PDF Documents
  > "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35
  > "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36
  "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
  > "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38
  > "Creating a Certified PDF Document in Mac OS X" on page 39
  > "Creating a Certified PDF Document by Printing to a Virtual Printer" on page 40

Creating Jobs from the Job List view

You can create a Certified PDF document from within the Instant PDF window.

To create a new job:

1 Do one of the following:

- Choose **Job** > **New**, select a PostScript or PDF file and click **Open**.
- Drag a PostScript or PDF file onto the Instant PDF application icon or its shortcut.

2 Select a PDF Queue to process the current job with.

3 Follow the instructions in the **Job Information** area to complete the job processing, if required:

- Save to folder
- Confirmation messages if file already exists
- Send e-mail attachment too large
- Review (see Reviewing a PDF Document).

See also:

- "Canceling a Job" on page 79
- "Pausing and Resuming a Job" on page 80
- "Reviewing a PDF Document" on page 82

Canceling a Job

Why Cancel a Job?

You may want to cancel the processing of a job when you think its results will be unacceptable.

For example, if during the review stage of the PDF creation process you find that the document contains errors that cannot be fixed in the PDF, you can cancel the job and fix the problem in the source documents.

Also, if a serious error occurred in a job, you may need to cancel it.

To cancel a job:

1 In the main Instant PDF window, click the **Jobs** button.

The **Job List** appears.

2 Select the job in the **Jobs In Progress** list which you want to cancel.

3 Click the **Cancel** button on the Instant PDF toolbar.

4 Click **OK** to confirm.

The canceled job will move to the **History** list.

See also:

- "Pausing and Resuming a Job" on page 80
- "Deleting a Job" on page 80

Pausing and Resuming a Job

Pausing Jobs

In some cases, you may want to pause a job.

For example, if you have submitted multiple jobs at the same time and you want to finish a specific job first, you will need to pause the jobs at the top of the **Jobs In Progress** list before jobs lower down in the list are processed.

To pause a job:

1 In the main Instant PDF window, click the **Jobs** button.

The **Job List** appears.

2 Select the job in the **Jobs In Progress** list which you want to pause.

3 Click the **Pause** button on the Instant PDF toolbar.

Resuming Jobs

Once a job has been paused, you can resume its processing.

To resume a job:

1 In the main Instant PDF window, click the **Jobs** button.

The **Job List** appears.

2 Select the paused job you want to resume from the **Jobs in Progress** list.

3 Click the **Resume** button on the Instant PDF toolbar.

See also:

- "Canceling a Job" on page 79

Deleting a Job

Deleting Jobs from the History List

Jobs which have been completed or canceled are kept in the **History** list. You can select the jobs in this list to view information about them:

- Has the job been completed successfully or did it fail?
- If the job failed, at which stage in the Certified PDF creation process did something go wrong?

This list can be cleaned up automatically at regular intervals: in the Instant PDF **Preferences**, you can choose to limit the number of jobs. You can also remove a job from this list by deleting it.

To delete a job from the History list:

1 In the main Instant PDF window, click the **Jobs** button.

The **Job List** appears.

2 Select the job which you want to remove from the **History** list.

3 Choose **History** > **Remove Job**.

The job is removed from the **History** list.

See also:

- "Preferences > Jobs History" on page 25
- "Viewing Jobs" on page 76

Saving PDF Files and/or Jobs

What Is Saved?

You can select a job in the **History** list and save either the entire job or just the PDF file in a separate folder. If you save a job, you will actually create a folder, which contains all the files relevant to this job, including:

- The Preflight Profile used in the PDF Queue
- Action Lists, if any, which were used in the PDF Queue
- The Certified PDF file which was generated
- The preflight report of the Certified PDF document
- The PostScript Printer Description (PPD) file which was used to create the PDF document
- Any PDF settings files which were used, e.g. Adobe PDF Settings, Adobe InDesign presets, QuarkXPress print styles or PDF export options

Why Save a PDF File or a Job?

You may wish to save a job or just the PDF file in the following situations:

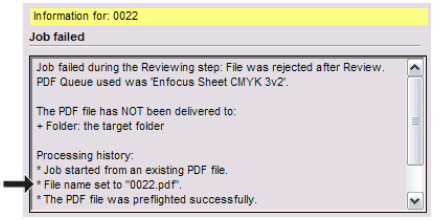
- The job failed because there were errors detected in the PDF document which you cannot resolve. Although the job failed, you will still have a Certified PDF document, but it will not be output-ready. You may want to send this PDF document to someone who can resolve the errors, e.g. using PitStop Professional or PitStop Server.
- You may wish to contact the Enfocus Customer Support Department with a particular problem. In this case, our support engineers will require all the relevant files to be able to investigate your problem.

To save a job or a PDF file in a specified folder:

1 In the main Instant PDF window, click the **Jobs** button to see the list of jobs.

2 Select the job in the **History** list which you wish to save or the job which contains the PDF file you need.

You can see the name of the PDF file in the Job information area. The PDF file will have the same name (or number) as the job, followed by the extension ".pdf".


Information for: 0022
Job failed
Job failed during the Reviewing step: File was rejected after Review.
PDF Queue used was 'Enfocus Sheet CMYK 3v2'.
The PDF file has NOT been delivered to:
+ Folder: the target folder
Processing history:
* Job started from an existing PDF file.
* File name set to "0022.pdf".
* The PDF file was preflighted successfully.

3 Do one of the following:

- Click the **Save PDF As** button to save the PDF file only.
- Click the **Save Job As** button to save all the files of the job in a separate folder.

4 Specify a name and location for the job or the PDF file, and then click **Save**.

Reviewing a PDF Document

Introducing the Review Step

PDF Queues can be configured to include a review step in every job that is submitted to them.

The review step allows you to review the document before it is saved, e-mailed or published to an FTP site. You can use this review opportunity to trace problems in the document before Instant PDF automatically dispatches it to the output location.

In practice, a job that was submitted to a PDF Queue that includes a review step will be paused until you review the document and either accept or reject it. The following information is displayed in the **Job Information** area for a job that needs to be reviewed:

- The current step is **Reviewing the created PDF File**, and the status is **Waiting for your input**.
- The results of the preflight check are listed, and three buttons are available: **Review**, **Reject PDF and Cancel Job**, and **Accept PDF and Continue**.

Reviewing, Accepting and Rejecting Documents

The review mechanism in Instant PDF works in two steps:

1 You review the PDF document that was created by Instant PDF. If the PDF document contains errors or warnings, the **preflight report** will automatically be displayed, so you can confidently trace any problems.

2 Based on your findings and the messages in the preflight report, you either **accept** or **reject** the document.

If you accept the document, job processing resumes normally, and the document will be saved or dispatched according to the PDF Queue settings.

If you reject the document, the job is automatically canceled and the PDF document is not saved.

How to Review a PDF Document

If the PDF Queue includes a review stage, the job automatically pauses after the document is preflighted and waits until you either accept or reject the document.

To review a document:

1 In the Instant PDF **Jobs in Progress** list, select the job that is waiting to be reviewed.

The **Job Information** area informs you that the job is waiting to be reviewed.

2 Click the **Review** button in the **Job Information** area.

Adobe Acrobat or any other PDF viewer opens, displaying both the created PDF document and its preflight report (In Adobe Acrobat the latter is only displayed if a preflight error was found).

3 Check the preflight report, as well as the document itself, for problems.

Click the **Help** ? button in the preflight report for more information on a specific report message.

4 Do one of the following:

- If you are satisfied with the quality of the document, click **Accept PDF and Continue**.
- If the document contains errors, you can click **Decide Later** first and check the errors and warnings listed in the preflight report first. If you cannot resolve the errors in the PDF document, click **Reject PDF and Cancel Job**.

When reviewing n Adobe Acrobat 8 or 9 you can also choose to accept, reject or decide later using the **Instant PDF Review** button on the Adobe Acrobat File toolbar.

See also:

- "Preflighting PDF documents" on page 45
- Creating and Editing PDF Queues > Editing an Enfocus PDF Queue > "Review" on page 109

Chapter 7

Chapter 7:
Creating and Editing PDF Queues

About This Chapter

An Enfocus PDF Queue is the core of Instant PDF. You always "send" your documents to a PDF Queue to turn them into Certified PDF documents. This chapter describes in detail how you can set up a PDF Queue and configure each of its properties, arranged in categories, correctly.

Topics

In this chapter:

- Creating a New Enfocus PDF Queue 86
- Editing an Enfocus PDF Queue 87
- Using Variables When Configuring PDF Queues 89
- PDF Queue Properties 90
- Information 91
- Author 92
- Color Management 92
- Locking 93
- File Name 95
- PostScript to PDF 96
- Output Options 97
- QuarkXPress 7 or 8 98
- Adobe InDesign CS3, CS4 or CS5 100
- Adobe Illustrator CS3, CS4 or CS5 102
- Virtual Printer 103
- Mac OS X 105
- Existing File 105
- Correction 106
- Preflight 108
- Review 109
- Save 110
- E-mail 112
- FTP 113
- Enfocus PowerSwitch 114
- Summary 115

Creating a New Enfocus PDF Queue

Ways to Create an Enfocus PDF Queue

You can create an Enfocus PDF Queue in various ways:

- Creating a New PDF Queue Yourself
- "Importing a PDF Queue" on page 120
- "Duplicating a PDF Queue" on page 122
- "Subscribing to a PDF Queue-based Specification on CertifiedPDF.net" on page 136

Creating a New PDF Queue Yourself

Creating a new PDF Queue implies that you configure each and every property of the PDF Queue. You may wish to do this, for example, if you want to create a completely new PDF Queue and publish this PDF Queue on CertifiedPDF.net.

To create a new PDF Queue yourself:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Click the **New** button or choose **PDF Queue** > **New**.

3 Select **Create your own PDF Queue** and click **OK**.

You have now accessed the **Enfocus PDF Queue Editor**.

4 Do one of the following:

- To check or change the main properties of the PDF Queue, click the **Standard** button.
- To check or change any of the properties of the PDF Queue, click the **Advanced** button.

5 Select and change the properties of your choice.

Follow the instructions in the Help area and the corresponding Help topics, which you can access by clicking the **Help** button (?). They will help you to configure the PDF Queue correctly.

6 Click **OK** when done.

See also:

- "Editing an Enfocus PDF Queue" on page 87
- "PDF Queue Properties" on page 90
- "Checking the Configuration Status of a PDF Queue: Valid, Partially Valid or Invalid" on page 87

Editing an Enfocus PDF Queue

Checking the Configuration Status of a PDF Queue: Valid, Partially Valid or Invalid

The configuration status of an Enfocus PDF Queue indicates whether or not all the properties of a PDF Queue have been configured correctly. The configuration status of a PDF Queue can be:

- Valid PDF Queue
- Partially Valid PDF Queue
- Invalid PDF Queue

Valid PDF Queue

An Enfocus PDF Queue is valid if at least the following key properties have been configured correctly or specified:

- The PDF Queue should have a name.
- At least one PDF creation method has to be selected.
- A Preflight Profile has to be assigned to the PDF Queue.
- At least one delivery method has to be configured correctly.

Partially Valid PDF Queue

An Enfocus PDF Queue is partially valid if one of the non-key properties has been configured incorrectly. You will be able to create and deliver Certified PDF documents if you use one PDF creation method, but not if you use another.

For example, you may have configured the properties for Adobe InDesign integration and selected the option to use PDF presets, but you may have omitted to specify a PDF presets file (*.pdfs or *.joboptions). The PDF Queue can then be partially valid if other PDF creation methods have been configured correctly, for example **QuarkXPress** or **Virtual Printer**.

Invalid PDF Queue

An Enfocus PDF Queue is invalid if at least one key property of the PDF Queue has not been selected or has been configured incorrectly. For example, a Preflight Profile may not have been selected.

To check the configuration status of a PDF Queue:

1. In the main Instant PDF window, click the **PDF Queues** button.
2. Select a PDF Queue in the list.
3. Check the PDF Queue's status in the information area.
4. If the PDF Queue is invalid, click the **Edit PDF Queue** button.
5. In the **Enfocus PDF Queue Editor**, click the **Advanced** button.
6. Check the lower-left corner of the **Enfocus PDF Queue Editor**. You will find instructions here how to correct configuration errors, if any.
7. Check the configuration status of the categories of properties and correct them.

Symbol	Meaning and usage
minus sign (-)	The category has not been enabled.
plus sign (+)	The category has been enabled and configured correctly.
exclamation points (!!!)	The category has not been configured correctly. Click this category and resolve the problem.

Using the Enfocus PDF Queue Editor: Advanced and Standard Editing Modes

Editing an Enfocus PDF Queue implies that you select one or more properties of the PDF Queue and change them. To do this, you use the **Enfocus PDF Queue Editor**.

The **Enfocus PDF Queue Editor** has two editing modes:

- A **standard** editing mode. You can use this mode if you just want to see or change the **main** properties of a PDF Queue. These main properties include the following categories: **Information**, **Preflight**, **Review**, **Save** and **Send**.
- An **advanced** editing mode. You can use this mode if you want to see **all** the properties of a PDF Queue.

To access the Enfocus PDF Queue Editor:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Do one of the following:

- To check or change the **main** properties of the PDF Queue, click the **Standard** button.
- To check or change **any** of the properties of the PDF Queue, click the **Advanced** button.

See also:

- "PDF Queue Properties" on page 90
- "Creating a New PDF Queue Yourself" on page 86

Using Variables When Configuring PDF Queues

Using Variables: Why and Where?

When you set up or configure a PDF Queue, there will be instances where you will have to enter data. This data may:

- vary, e.g. the date and/or time when the PDF document is created
- already be available and known in Instant PDF, e.g. your user name or company name.

Instead of typing this information in a given text box, you can use variables to provide the required information. The text of the variable will then be filled in automatically at the appropriate time, e.g. when the PDF file is created or saved.

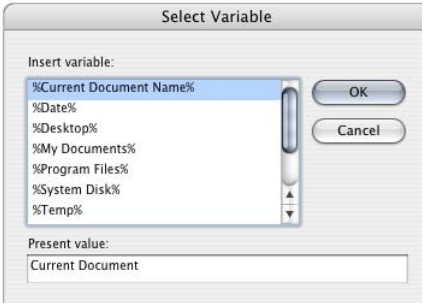
You can use the following variables in the following situations:

Variable	Meaning	Example	Usage
%User Company%	The name of the registered company of Instant PDF. Equals "<Trial>" if Instant PDF is not registered and "<Empty>" if the company has not been filled in in the registration information.	Enfocus	To compose the file name of the generated PDF document. See: PDF Queue Properties > "File Name" on page 95
%Current Document Name%	The name of the original source document.	Document1	
%User Name%	The name of the registered user of Instant PDF. Equals "<Trial>" if Instant PDF is not registered.	John Doe	
%Time%	The current time.	09_50_29 (meaning 9.50 a.m., 29 seconds)	
%Unique ID%	A sequential number to make the (file) name unique.	123	
%Date%	The current date in a format acceptable for the current language.	May 6, 2004	
%Temp%	The full path to the temporary files folder for the current user.	C:\Documents and Settings\jdoe\Local Settings\Temp	• To specify the folder where the PDF files have to be saved. • To specify the application in which the PDF files have to be opened when ready. See: PDF Queue Properties > "Save" on page 110
%Program Files%	The full path to the programs folder for the current user.	C:\Program Files	
%System Disk	The full name of the System Disk	C:\	
%My Documents%	The full path to the documents folder for the current user.	C:\Documents and Settings\jdoe\My Documents	
%Desktop%	The full path to the desktop for the current user.	C:\Documents and Settings\jdoe\Desktop	

Structure of a Variable

A variable consists of a name and a value:

- The variable name is what you see in the list when you want to select a variable.
- The variable value is how the variable has been filled in. It appears below the variable name to give you an idea about its usage.



PDF Queue Properties

Overview of PDF Queue Properties

The table below gives an overview of all the properties of a PDF Queue which you can specify or change using the **Enfocus PDF Queue Editor**. You will be able to edit all of them in **advanced** mode, but only some of them in **standard** mode. The properties which you can edit in standard mode are indicated separately.

Category	Property	Editable in standard mode
General	Information	x
	Author	
	Color Management	
	Locking	
Job Info	File Name	x
PDF Creation	PostScript to PDF	
	Output Options	
	QuarkXPress 7 or 8	
	Adobe InDesign CS3, CS4 or CS5	
	Adobe Illustrator CS3, CS4 or CS5	
	Virtual Printer	
	Mac OS X	
	Existing File	
Processing	Correction	
	Preflight	x
	Review	x
Delivery	Save	x
	E-mail	x
	FTP	x
	Enfocus Switch	x
Summary		

Information

Filling in or Changing the Name and Description of a PDF Queue

Proceed as follows:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Click the **Information** category.
4. Fill in or change the Name and Description of the PDF Queue, following the on-screen instructions in the **Help** area.

If one or more properties in this category is locked, see "Locking" on page 93.

Name

The name as it appears in this text field is identical to the name of the PDF Queue as you will see it elsewhere in Instant PDF:

- In the list of PDF Queues in the main Instant PDF window
- In the list of PDF Queues which you see when you print or save your original document from within an application to one of the PDF Queues
- The name of the virtual printer which has been created for the PDF Queue

If you wish, you can give the PDF Queue a name which is more meaningful for you and/or the people who will be using the PDF Queue.

If you use a PDF Queue from CertifiedPDF.net, you may not want to change the name of the PDF Queue. If you do wish to change the name of this PDF Queue, make sure that you, and the people who will be using this PDF Queue, can still know that this is a PDF Queue from CertifiedPDF.net. It may be an idea to mention the original name of the CertifiedPDF.net Queue in the description of the PDF Queue.

Description

The description of the PDF Queue can be any information which you want to share with those who will be using the PDF Queue. You will also see this description when you select the PDF Queue in the list in the main Instant PDF window.

Minimum Instant PDF version to use this queue in

With this option you can set the minimum version number of Instant PDF in which this PDF Queue may be used. If the PDF Queue contains settings that are not supported by that version (because it was created in a newer version), the PDF Queue cannot be read regardless of this setting.

For version 08, this should be entered as "08" or "08, update 1".

You can find the build number on the Support Info tab of the Enfocus Instant PDF About panel.

Author

Filling in or Changing the Author's Details of a PDF Queue

Proceed as follows:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Author** category.
5. Fill in your name, company and contact details, following the on-screen instructions in the **Help** area.

If one or more properties in this category is locked, see "Locking" on page 93.

Author = PDF Queue Creator

The author of a PDF Queue is the person who creates and configures the PDF Queue. You can enter your name, company name and contact details here, so that the users of the PDF Queue will know how to reach you if they have any questions of problems.

If you are using a Specification with a PDF Queue from CertifiedPDF.net, you will find extensive contact information in the Specification itself.

Color Management

Disable Color Management

If the **Disable Color Management** option is selected, no ICC profiles will be used for color conversion. In this case, the default PostScript color conversion rules will be used. If Color Management is enabled in the Preflight Profile, it will take priority over this option.

Use general Instant PDF preferences

If this option is selected, the ICC profiles from the general Instant PDF preferences for color conversion will be used. However, if Color Management is enabled in the Preflight Profile, it will take priority over this option.

See also:

- "Preferences > Jobs Color Management" on page 24

Locking

Ways to Lock Properties of a PDF Queue

You can lock one or more properties of a PDF Queue to prevent the users of the PDF Queue from changing these properties accidentally or incorrectly. There are various ways to lock properties of a PDF Queue:

- Locking Individual Properties of a PDF Queue
- Locking Properties "on Top of" Other Properties
- Locking Collections of Properties

Locking Individual Properties of a PDF Queue

If you lock properties of a PDF Queue, you will be promped to enter a password. You, or the users of the PDF Queue, will need to enter this password to unlock these properties again.

Padlock icons next to the properties indicate whether the respective property is locked or unlocked:

Icon	Meaning
	The property is unlocked.
	The property is locked.

To lock or unlock individual properties of a PDF Queue:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Select the appropriate category of properties.
5. Click the padlock next to the property which you wish to lock or unlock.

If you lock or unlock the property for the first time, you will be prompted to enter a name and password and click **OK**.

6. Lock or unlock the properties of your choice.
7. If necessary, click other categories and lock or unlock the respective properties.
8. Click **OK** when done.

Locking Properties "on Top of" Other Properties

There may be situations where you have a PDF Queue in which a number of properties have been locked already. You may then wish to:

- Unlock some of these properties
- Lock some additional properties "on top of" the ones which are already locked.

You can do this in the same way as you would lock or unlock individual properties of a PDF Queue, provided that you know the password of the properties which have already been locked.

Locking Collections of Properties

Instead of locking or unlocking individual properties of a PDF Queue, you can also lock or unlock a collection of properties:

- All properties
- No properties
- Properties which are relevant to you if you are a member of an industry association, printer or publisher

Be careful, however, if you apply a collection of locked properties in a PDF Queue which has already a number of locked properties. The settings of the collection of locked properties will override the properties which were already locked in the PDF Queue. Suppose you have a PDF Queue, named

"CMYK Ads" in which a number of properties have been locked and you apply a collection of locks to this PDF Queue. The following can happen:

Property	PDF Queue "CMYK Ads"	Collection of locked properties	Result
A	Unlocked	Locked	Locked
B	Locked	Unlocked	Unlocked
C	Locked	Locked	Locked
D	Unlocked	Not specified	Unlocked
E	Locked	Not specified	Locked

To lock or unlock a collection of properties:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Locking** category.
5. Select a **Lock Collection** and read the text in the **Description** box to see which categories of properties will be locked.
6. Click **Set Locks**.
7. Click **OK**.

File Name

Naming PDF Documents

You can specify how the names should be of the PDF documents which are generated through the PDF Queue:

- Use Specified Name
- Ask Every Time

To configure PDF file naming in a PDF Queue:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **File Name** category.
5. Select the appropriate option, following the on-screen instructions in the **Help** area:

- Use Specified Name, and use variables to compose the file name of generated documents
- Ask Every Time

If this property is locked, see "Locking" on page 93.

Use Specified Name

Select the option **Use specified name** if you wish to generate file names for your PDF documents automatically as these PDF documents are created by the PDF Queue. You can specify the file name syntax, i.e. the building blocks which make up the name of your PDF document. If you do this, you can use:

- A prefix
- A suffix
- One or more variables

The prefix or suffix can be any text which you wish to include in the file name of the PDF document. You may want to include a reference:

- To the name of of the PDF Queue with which the PDF document was created
- To the name of the Preflight Profile with which the PDF document was prelighted.

Naming your PDF documents this way may be particularly convenient if you are using a PDF Queue or Preflight Profile from a Specification on Certified-PDF.net.

Example

An example of a file name could be:
CMYK_brochure14042004.PDF

where we can distinguish the following building blocks:

File name	CMYK_	brochure	14042004	PDF
Syntax	CMYK_	%File_name%	%Date%	PDF
	Prefix	Variable	Variable	Extension

Ask Every Time

Select the option **Ask every time** if you wish to enter a file name for each PDF document that is generated by the PDF Queue. You may not want to do this if you will be creating a large volume of PDF documents.

See also:

- "Using Variables When Configuring PDF Queues" on page 89
- "Save" on page 110

PostScript to PDF

Converting PostScript Files to Certified PDF Documents Using an Enfocus PDF Queue

You can use a PDF Queue to convert your PostScript files to Certified PDF documents. This method is similar to the traditional way of creating PDF document using Acrobat Distiller:

1. You create a PostScript file of your original document. You use a printer driver, for example Adobe PDF, in this process.
2. Acrobat Distiller converts the PostScript file to a PDF file using specific conversion settings (called "**Adobe PDF Settings**" in Acrobat Distiller 8 and 9).

If you enable the PDF Queue to convert PostScript files to PDF files, you can also specify the conversion settings:

- Using an Adobe PDF Settings File (*.joboptions)
- Deriving the Acrobat Distiller PDF Settings from the Preflight Profile

To configure a PDF Queue for PostScript to PDF conversion:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **PostScript to PDF** category.
5. Select the option **Allow PostScript to PDF conversion**.
6. Configure the PDF Queue for PostScript to PDF conversion, following the on-screen instructions in the **Help** area.

If one or more properties in this category is locked, see "Locking" on page 93.

Using an Adobe PDF Settings File (*.joboptions)

Adobe PDF Settings are commonly known as Acrobat Distiller **Job Options**. Both are the same: the collection of settings which Acrobat Distiller is using to convert PostScript files to PDF. They are now called **Adobe PDF Settings** in Acrobat Distiller 8 and 9 but were called **Job Options** in previous versions.

Using an **Adobe PDF Settings File** (***.joboptions**) in your PDF Queue is like you would use Acrobat Distiller. It is important to check these settings carefully, because they will ultimately define the quality of your PDF documents. You can check **Adobe PDF Settings** in Acrobat Distiller.

Deriving the Acrobat Distiller PDF Settings from the Preflight Profile

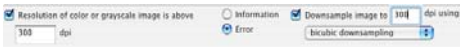
Your PDF Queue will always use a Preflight Profile to preflight the PDF documents: check a number of properties in the PDF document and fix (potential) problems, if any. As such, the Preflight Profile is the key determinant of the quality of your PDF document. Therefore, you may want to derive the Acrobat Distiller PDF settings from the Preflight Profile. This means that certain checked properties in the Preflight Profile will be detected and will be set correspondingly in the Acrobat Distiller PDF settings.

Example: Deriving the Downsampling Settings from a Preflight Profile

Suppose you want the maximum resolution of the images in your PDF document to be 300 dots per inch (dpi). You can then use a Preflight Profile in your PDF Queue which will do the following:

1. Check the resolution of the images in your PDF documents.
2. Downsample the images to 300 dpi if their original resolution was higher.

This setting can automatically be derived from the Preflight Profile and specified accordingly in the Acrobat Distiller PDF settings.



Checked property in a Preflight Profile

Derived corresponding setting in Acrobat Distiller

See also:

- Creating Certified PDF Documents > "Understanding the PDF Creation Process" on page 30
- "QuarkXPress 7 or 8" on page 98
- "Adobe InDesign CS3, CS4 or CS5" on page 100
- "Adobe Illustrator CS3, CS4 or CS5" on page 102
- "Virtual Printer" on page 103

Output Options

Deriving PDF settings from a Preflight Profile

You can set up a PDF Queue for Adobe InDesign CS3, CS4 or CS5, Adobe Illustrator CS3, CS4 or CS5, or QuarkXPress 7 or 8, and select the option to let the PDF Queue derive the PDF settings from its associated Preflight Profile. These PDF settings can be:

- PDF Output Styles or Print Output Styles of QuarkXPress 7 or 8
- PDF presets of Adobe InDesign CS3, CS4 or CS5
- PDF presets of Adobe Illustrator CS3, CS4 or CS5

If you do this, you can also select and specify the following output options:

- Spreads
- Printer marks
- Bleed

See the Adobe InDesign, Adobe Illustrator or QuarkXPress documentation or Help for more information about spreads, printer marks or bleed.

To specify Adobe InDesign, Adobe Illustrator and QuarkXPress output options:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Output Options** category.
5. Select output options of your choice and, if necessary, specify the bleed size.

If one or more properties in this category is locked, see "Locking" on page 93.

6. Click **OK**.

See also:

- "Preferences > Units" on page 21

- "QuarkXPress 7 or 8" on page 98
- "Adobe InDesign CS3, CS4 or CS5" on page 100
- "Adobe Illustrator CS3, CS4 or CS5" on page 102

QuarkXPress 7 or 8

Where to Start?

You can use Instant PDF as a plug-in for QuarkXPress 7 or 8, which implies that you configure your PDF Queue to be integrated into QuarkXPress. You will then be able to save your QuarkXPress file as a Certified PDF document using that PDF Queue.

If you set up a PDF Queue for use with QuarkXPress, you will have the choice:

- You can use QuarkXPress Print Output Styles or PDF Output Styles in your Enfocus PDF Queue. You may want to do this if you use very specific settings in your PDF workflow. Of course, creating QuarkXPress Print Output Styles or PDF Output Styles requires a certain level of technical expertise because you have to understand the meaning and impact of all the options you select. Therefore, it will typically be the PDF document receiver, e.g. a printer or publisher, who will create Print Output Styles or PDF Output Styles and distribute them to the PDF document creators.
- You can automatically derive the PDF settings from the Preflight Profile which you use in your PDF Queue, in which case you just need to Set Up a PDF Queue for QuarkXPress 7 or 8.

If you wish to use QuarkXPress Print Output Styles or PDF Output Styles, you need to proceed as follows:

1 Export QuarkXPress PDF Output Styles to a File

or

2 Export QuarkXPress Print Output Styles to a File

Export QuarkXPress PDF Output Styles to a File

You can use QuarkXPress PDF Output Styles in an Enfocus PDF Queue if you select **Direct PDF Export** as your preferred PDF creation method. You configure these PDF Output Styles in QuarkXPress, export them to a (*.XML) file and link this file to your PDF Queue.

To export QuarkXPress PDF Output Styles to a file:

1 In QuarkXPress, choose **Edit** > **Output Styles**. **New** > **PDF**

2 Enter a name and specify the appropriate settings for your PDF output, and click **OK**.

3 Select that PDF Output Style and choose **Export** to save it in a folder of your choice. The file type will be ".XML".

Export QuarkXPress Print Output Styles to a File

You can use QuarkXPress Print Output Styles in an Enfocus PDF Queue if you select **PS** (PostScript) **Export** as your preferred PDF creation method. You configure these Print Output Styles in QuarkXPress, export them to a (*.XML) file and link this file to your PDF Queue.

To export QuarkXPress Print Output Styles to a file:

1 In QuarkXPress, choose **Edit** > **Output Styles**. **New** > **Print**

2 Enter a name and specify the appropriate settings for your PS output, and click **OK**.

3 Select that Print Output Style and choose **Export** to save it in a folder of your choice. The file type will be ".XML".

Set Up a PDF Queue for QuarkXPress 7 or 8

Before you can successfully use the **Save As** Certified PDF command from the QuarkXPress **File** menu, you must set up a PDF Queue that contains the appropriate settings for QuarkXPress.

There are two mechanisms that you can use when creating a Certified PDF document from QuarkXPress:

- **Direct PDF export**: QuarkXPress saves the document directly to PDF.
- **PostScript to PDF export**: behind the scenes, QuarkXPress creates a PostScript file first. This PostScript file is automatically passed on to Instant PDF.

To configure a PDF Queue for use with QuarkXPress 7 or 8:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select a PDF Queue in the list and click the **Edit** button.

3 Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.

4 Click the **QuarkXPress 7** category.

5 Select the option **Allow QuarkXPress 7 integration** or **Allow QuarkXPress 8 integration**.

6 Follow the on-screen instructions in the **Help** area to specify the way in which you will be creating PDF documents from QuarkXPress in order of priority:

- Direct PDF Export
- PS (PostScript) Export

If one or more properties in this category is locked, see "Locking" on page 93.

Direct PDF Export

If you selected **Direct PDF Export** as the preferred method of creating PDF documents, you can also specify which PDF export options you will use when you save your QuarkXPress as a Certified PDF document:

- The settings derived from the Preflight Profile of the PDF Queue.
- The settings from a QuarkXPress PDF Output Styles file (*.XML).

PS (PostScript) Export

If you selected **PS** (PostScript) **Export** as the preferred PDF creation method, a PostScript file will be created first using a virtual printer.

You can use:

- The settings derived from the Preflight Profile of the PDF Queue.
- The settings from a QuarkXPress Print Output Styles file (*.XML).

Check the categories **Virtual Printer** and **PostScript to PDF** and make sure that these properties have been correctly configured too.

See also:

- Creating and Editing PDF Queues
  > "PostScript to PDF" on page 96
  > "Output Options" on page 97
  > "Virtual Printer" on page 103
- "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35
- "Preferences > Applications" on page 26

Adobe InDesign CS3, CS4 or CS5

Where to Start?

You can use Instant PDF as a plug-in for Adobe InDesign CS3, CS4 or CS5, which implies that you configure your PDF Queue to be integrated into Adobe InDesign CS3, CS4 or CS5. You will then be able to save your Adobe InDesign file as a Certified PDF document using that PDF Queue.

If you set up a PDF Queue for use with Adobe InDesign CS3, CS4 or CS5, you will have the choice:

- You can use Adobe InDesign PDF presets in your Enfocus PDF Queue, in which case you need to Create and Save an Adobe InDesign PDF Preset in a Separate File first. You may want to do this if you use very specific settings in your PDF workflow. Of course, creating presets requires a certain level of technical expertise because you have to understand the meaning and impact of all the options you select. Therefore, it will typically be the PDF document receiver, e.g. a printer or publisher, who will create presets and distribute them to the PDF document creators.
- You can automatically derive the PDF settings from the Preflight Profile which you use in your PDF Queue, in which case you just need to Set Up a PDF Queue for Adobe InDesign CS3, CS4 or CS5.

Create and Save an Adobe InDesign PDF Preset in a Separate File

When you print your original source documents or create a PDF file, you always use a number of PDF-related settings to get the desired output. You can save or export these settings as a file for future use. You may want to do this to make them available to your service providers, clients or PDF document creators, but also to use them in your Enfocus PDF Queue.

The PDF-related settings are called **presets** in Adobe InDesign:

- **PDF presets**, which you use when you export your Adobe InDesign documents to PDF (**File** > **Export**).

To create and save an Adobe InDesign PDF preset in a separate file:

1. In Adobe InDesign CS3, CS4 or CS5, Choose **File** > **Adobe PDF Presets** > **Define**.
2. If necessary, create a new preset or edit an existing one.
3. Save the preset file in a folder of your choice:

- Save the PDF preset in a *.joboptions file.

For more information about creating PDF presets, see the Adobe InDesign documentation or Help.

Set Up a PDF Queue for Adobe InDesign CS3, CS4 or CS5

Before you can successfully use the **Save As Certified PDF** command from the Adobe InDesign **File** menu, you must set up a PDF Queue that contains the appropriate settings for Adobe InDesign.

To configure a PDF Queue for use with Adobe InDesign CS3, CS4 or CS5:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Adobe InDesign CS3, Adobe InDesign CS4** or **Adobe InDesign CS5** category.
5. Select the option **Allow Adobe InDesign CS3 integration**, **Allow Adobe InDesign CS4 integration** or **Allow Adobe InDesign CS5 integration**.

If one or more properties in this category is locked, see "Locking" on page 93.

Check the categories **Virtual Printer** and **PostScript to PDF** and make sure that these properties have been correctly configured too.

See also:

- Creating and Editing PDF Queues
  > "PostScript to PDF" on page 96
  > "Output Options" on page 97
  > "Virtual Printer" on page 103
- "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36
- "Preferences > Applications" on page 26

Adobe Illustrator CS3, CS4 or CS5

Where to Start?

You can use Instant PDF as a plug-in for Adobe Illustrator CS3, CS4 or CS5 which implies that you configure your PDF Queue to be integrated into Adobe Illustrator. You will then be able to save your Adobe Illustrator file as a Certified PDF document using that PDF Queue.

If you set up a PDF Queue for use with Adobe Illustrator CS3, CS4 or CS5, you will have the choice:

- You can use Adobe Illustrator PDF presets in your Enfocus PDF Queue, in which case you need to Create and Save an Adobe Illustrator PDF Preset in a Separate File first. You may want to do this if you use very specific settings in your PDF workflow. Of course, creating presets requires a certain level of technical expertise because you have to understand the meaning and impact of all the options you select. Therefore, it will typically be the PDF document receiver, e.g. a printer or publisher, who will create presets and distribute them to the PDF document creators.
- You can automatically derive the PDF settings from the Preflight Profile which you use in your PDF Queue, in which case you just need to Set Up a PDF Queue for Adobe Illustrator CS3, CS4 or CS5.

Create and Save an Adobe Illustrator PDF Preset in a Separate File

When you print your original source documents or create a PDF file, you always use a number of print- or PDF-related settings to get the desired output. You can save or export these settings as a file for future use. You may want to do this to make them available to your service providers, clients or PDF document creators, but also to use them in your Enfocus PDF Queue.

The PDF-related settings are called **presets** in Adobe Illustrator:

- **PDF presets**, which you use when you export your Adobe Illustrator documents to PDF (**File** > **Export**).

To create and save an Adobe Illustrator print preset or PDF preset in a separate file:

1. In Adobe Illustrator, Choose **Edit** > **Adobe PDF Presets** on Windows, or **File** > **Adobe PDF Presets** > **Define** on Mac OS X.
- If necessary, create a new preset or edit an existing one.
2. Save the preset file in a folder of your choice:
- Save the PDF preset in a *.joboptions file.

For more information about creating PDF presets, see the Adobe Illustrator documentation or Help.

3. Set Up a PDF Queue for Adobe Illustrator CS3, CS4 or CS5 and link the preset file to the PDF Queue.

Set Up a PDF Queue for Adobe Illustrator CS3, CS4 or CS5

Before you can successfully use the **Save As Certified PDF** command from the Adobe Illustrator **File** menu, you must set up a PDF Queue that contains the appropriate settings for Adobe Illustrator.

To configure a PDF Queue for use with Adobe Illustrator CS3, CS4 or CS5:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Adobe Illustrator CS3, Adobe Illustrator CS4** or **Adobe Illustrator CS5** category.

5 Select the option **Allow Adobe Illustrator CS3 integration, Allow Adobe Illustrator CS4 integration** or **Allow Adobe Illustrator CS5 integration**.

If one or more properties in this category is locked, see "Locking" on page 93.

Check the categories **Virtual Printer** and **PostScript to PDF** and make sure that these properties have been correctly configured too.

See also:

- Creating and Editing PDF Queues
  > "PostScript to PDF" on page 96
  > "Output Options" on page 97
  > "Virtual Printer" on page 103
- "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
- "Preferences > Applications" on page 26

Virtual Printer

Presenting a PDF Queue As a Virtual Printer

You can allow Instant PDF to present the PDF Queue as a virtual printer. This means that the PDF Queue will appear as a "printer" in the list of Printers and Faxes (Windows) or on the desktop (Mac OS). You can then create Certified PDF documents simply by printing to this virtual printer from within any application in Windows or in the Mac OS.

You may want to use a different method, however, in Mac OS X or in applications where you can use Instant PDF as a plug-in. See:

- "Creating a Certified PDF Document in QuarkXPress 7 or 8" on page 35
- "Creating a Certified PDF Document in Adobe InDesign CS3, CS4 or CS5" on page 36
- "Creating a Certified PDF Document in Adobe Illustrator CS3, CS4 or CS5" on page 37
- "Creating a Certified PDF Document in Adobe Acrobat 8 or 9" on page 38

To configure a PDF Queue for use with a virtual printer:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select a PDF Queue in the list and click the **Edit** button.

3 Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.

4 Click the **Virtual Printer** category.

5 Select the option **Allow Virtual Printer**.

6 Select a PostScript Printer Description (PPD) file, following the on-screen instructions in the **Help** area.

If one or more properties in this category is locked, see "Locking" on page 93.

Name of the Virtual Printer

The name of the virtual printer as it appears in the list of Printers and Faxes (Windows) or on the desktop (Mac OS) will be the same as the name of the PDF Queue which the virtual printer represents.

Do not change this name outside Instant PDF because the PDF Queue may become invalid and may no longer work properly.

Printer Drivers, PPDs and Instant PDF queues

When you create and set up an Enfocus PDF Queue, you may want to present your PDF Queue as a virtual printer and use a specific PPD for the PostScript to PDF conversion.

It is important that you have a good understanding of what printer drivers and PPDs are and can do, because they will very much contribute to the quality and look of your PDF document.

Printer Drivers

Every printer which you install on your computer system has a printer driver. A printer driver is a utility that enables your applications, e.g. authoring or (graphic) design programs, to control the printer. Basically, a printer driver is necessary to transfer the data from your applications to the printer correctly.

AdobePS is an example of a PostScript printer driver.

PostScript Printer Description (PPD) Files

A PostScript printer does not only have a printer driver, but also a PostScript Printer Description file, abbreviated as PPD. A PPD describes the features which are specific to your PostScript printer and makes these features accessible in your native application. Examples of these features are fonts, paper sizes, resolution, color and finishing options, such as stapling and sorting.

For example, if you have a high-volume laser printer which can print pages double-sided to a mailbox and staple these sets, you will be able to select these options when you print a file. The PPD will present these options in a graphical user interface.

PostScript printers use PPD files to determine how to print your document. If you do not use the correct PPD file when you print, your document might not print correctly or not all of the printer's features will be available when you print.

In Microsoft Windows, a PostScript printer driver is always linked to a PPD. On the Macintosh, you can use different PPDs with the same printer driver.

Acrobat Distiller (Adist5.ppd) is an example of a PPD. You can find this PPD on the Adobe Web site.

See also:

- Creating and Editing PDF Queues
  > "PostScript to PDF" on page 96
  > "Creating a Certified PDF Document by Printing to a Virtual Printer" on page 40

Mac OS X

Save As Certified PDF in Mac OS X

You can allow Mac OS X PDF creation in your PDF Queue. The users of the PDF Queue will then be able to save their original documents as Certified PDF documents from within any application in Mac OS X.

To configure a PDF Queue for use with Mac OS X:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Mac OS X** category.
5. Select **Allow Mac OS X PDF Creation**.

If the option in this category is locked, see "Locking" on page 93.

See also:

- "Creating a Certified PDF Document in Mac OS X" on page 39

Existing File

Importing Existing PDF or PostScript Files

You can configure the PDF Queue in such a way that you can import existing PostScript or PDF files into the PDF Queue.

Proceed as follows:

To configure a PDF Queue for importing existing PDF or PostScript files:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Existing File** category.
5. Select the required options, following the on-screen instructions in the **Help** area.

If one or more properties in this category is locked, see "Locking" on page 93.

Importing Existing PDF Files

Maybe you already have PDF files or you receive PDF files from elsewhere which you have to "convert" to output-ready Certified PDF files. And you cannot, or don't want to, open the source files of these PDF documents and re-create them using a PDF Queue. In cases like these, you can allow existing PDF files to be imported into a PDF Queue. The PDF Queue will at least perform a preflight check of the PDF document using a Preflight Profile and fix errors, if any. The PDF Queue may also:

1. Correct any errors in the PDF document using one or more Action Lists or active fixes in the Preflight Profile
2. Present the PDF document for review before delivering it as a Certified PDF document

Importing Existing PostScript Files

If you allow importing existing PostScript files into a PDF Queue, you will be using Instant PDF in a similar way as Acrobat Distiller:

1 You import (or open) a PostScript file in Instant PDF.

2 You convert the PostScript file to a Certified PDF file.

The main difference is, however, that you will not have a regular PDF document, but a preflighted and output-ready Certified PDF document.

See also:

- "PostScript to PDF" on page 96
- "Understanding the PDF Creation Process" on page 30

Correction

Correcting PDF Documents Using Action Lists

When the PDF document has been created using a PDF Queue, its technical quality can be assured in the following stages of the process:

1 Correction

2 Preflighting

3 Review: visually inspecting the PDF document in Adobe Acrobat, Adobe Reader or in any application of your choice.

The first of these quality assurance stages, correction, can be done automatically by one or more Enfocus Action Lists. An Action List is a series of Enfocus actions grouped together as a single command to carry out (corrective) tasks automatically in a PDF document. This stage is optional: you can assign one or more Action Lists to a PDF Queue if you wish but you are not obliged to do so.

You cannot create Action Lists in Instant PDF —you need Enfocus PitStop Pro to do this— but you can include them in your workflow by assigning them to a PDF Queue.

To add one or more Action Lists to a PDF Queue:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select a PDF Queue in the list and click the **Edit** button.

3 Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.

4 Click the **Correction** category.

5 Click the + button to open the Select Action List dialog.

6 Select one or more Action Lists you want to add, either From Database or From file

7 Click OK. The Action Lists of your choice are added to the bottom of the list of **Action Lists to run on the PDF file**. The Action Lists appear in this list in the order in which they will be run on the PDF documents: the Action List on top of the list will start first.

8 If necessary, change the order of the Action Lists: select an Action List and click the **Move Up** ( ) or **Move Down** ( ) button.

If one or more properties in this category is locked, see "Locking" on page 93.

Where Can I Find Action Lists?

If you want to add Action Lists to your PDF Queue, this is where you can find them:

From Database

The Database contains predefined Action Lists and Action Lists which are already available in the Enfocus Action List Database. Both are installed on your computer's hard disk along with Instant PDF. The Enfocus Action List Database can also be used and updated by other Enfocus products, such as Enfocus PitStop Pro (7.0 or higher) and Enfocus PitStop Server (4.0 or higher). This means that, if you create an Action List with PitStop Pro, it will also appear in the **From Database** list in the **Select Action List** dialog.

The Global list contains Action Lists available to all users on the computer. The Local list is only available to the current user.

From file

You can use Action Lists from elsewhere on your computer's hard disk or on a network drive, for example, if someone has sent you an Action List by e-mail. The default extension of an Action List's file name is *.eal.

The Browse button allows to select the Action List you want to use.

Enfocus Action List Library

You can also find Action Lists on the Enfocus Action List Library page on the Enfocus Web site: www.enfocus.com > Support > Download > Action Lists.
You can also access this page from within Instant PDF: choose **Help** > **Online Resources** > **Action List Library**, or by clicking the **More Action Lists available in the Action List library** hyperlink in the Select Action List window.

Select an Action List or the complete Enfocus Action List Library and download the archive file. Extract or expand the Action Lists in the archive file to a folder, then click the + button again in the **Enfocus PDF Queue Editor** to add the Action Lists to your PDF Queue

See also:

- "Using Action Lists" on page 51
- "Preflighting PDF documents" on page 45
- "Preflight" on page 108
- www.enfocus.com > Products > Enfocus PitStop Pro

Preflight

Preflighting PDF Documents Using Preflight Profiles

A PDF document can be corrected or changed automatically using one or more Action Lists. The next stage in assuring the technical quality of your PDF documents is preflighting.

To preflight PDF documents, you assign a Preflight Profile to your PDF Queue. A Preflight Profile is a collection of criteria which a PDF document must meet to be outputworthy. For each criterion, the Preflight Profile specifies:

- If it should be checked or not
- How deviating properties in the PDF document should be listed in the preflight report, i.e. as **Information** or as **Error**

Moreover, a Preflight Profile can automatically fix some of the detected (potential) problems in the PDF document.

The preflighting stage is mandatory: a PDF Queue without a Preflight Profile cannot be a valid PDF Queue.

You cannot create a Preflight Profile in Instant PDF —you need Enfocus PitStop Pro, Enfocus PitStop Server or Enfocus PitStop Automate to do this— but you need to include it in your workflow by assigning it to a PDF Queue.

To add a Preflight Profile to a PDF Queue:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Click the **Preflight** category.
4. Click the + button to open the **Select Preflight Profile** dialog.
5. Select the Profile you want to use, either From Database or From file.
6. Click OK. The name of the Preflight Profile, and its description will be shown.

If one or more properties in this category is locked, see "Locking" on page 93.

Where Can I Find Preflight Profiles?

If you want to add a Preflight Profile to your PDF Queue, this is where you can find them:

From Database

The Database contains predefined Preflight Profiles and Preflight Profiles which are already available in the Enfocus Preflight Profiles Database. Both are installed on your computer's hard disk along with Instant PDF. The Enfocus Preflight Profile Database can also be used and updated by other Enfocus products, such as Enfocus PitStop Pro (7.0 or higher) and Enfocus PitStop Server (4.0 or higher). This means that, if you create a Preflight Profile with PitStop Pro, it will also appear in the **From Database** list in the **Select Preflight Profile** dialog.

The Global list contains Preflight Profiles available to all users on the computer. The Local list is only available to the current user.

From file

You can use Preflight Profiles from elsewhere on your computer's hard disk or on a network drive, for example, if someone has sent you a Preflight Profile by e-mail. The default extension of a Preflight Profile's file name is *.ppp.

The Browse button allows to select the Preflight Profile you want to use.

Enfocus Preflight Profiles Library

You can also find Preflight Profiles on the Enfocus Preflight Profiles Library page on the Enfocus Web site: www.enfocus.com > Support > Download > Preflight Profiles. You can also access this page from within Instant PDF: choose **Help** > **Online Resources** > **Preflight Profiles Library**, or by clicking the **More Preflight Profiles available in the Preflight Profiles Library** hyperlink in the Select Preflight Profiles window.

1 Select a Preflight Profile or the complete Enfocus Preflight Profile Library and download the archive file. Extract or expand the Preflight Profiles to a folder, then click the + button again in the **Enfocus PDF Queue Editor** to add the Preflight Profile to your PDF Queue

- "Using Action Lists" on page 51
- "Preflighting PDF documents" on page 45
- www.enfocus.com > Products > Enfocus PitStop Pro

Review

Review before Delivery

Reviewing the PDF document is the final stage in the PDF quality assurance process:

1 The PDF document may have been corrected using one or more Action Lists

2 The PDF document has been submitted to a preflight check using a Preflight Profile

3 You may wish to review the Certified PDF document before you deliver it.

Reviewing a PDF document can mean, for example, that you open the PDF document in Adobe Acrobat or Adobe Reader and inspect it visually. However, some (potential) problems in the PDF document may not be immediately visible on screen. Therefore, you may be using a PDF editing tool like Enfocus PitStop Pro to take a look "inside" the PDF document.

To configure a PDF Queue for review:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select a PDF Queue in the list and click the **Edit** button.

3 Click the **Review** category.

4 Select the option **Review the PDF file before delivery** and specify what should happen with a job that needs reviewing:

- Pause
- Open Automatically

If one or more properties in this category is locked, see "Locking" on page 93.

Pause

You can choose to pause a PDF document if you, or any other users of the PDF Queue, wish to review the PDF document at a moment which you find convenient. This may be a good option if you will be creating a large number of PDF documents. You can then review a collection of PDF documents at regular intervals.

As soon as the PDF documents have been preflighted, they will remain in the **Jobs in Progress** list in the main Instant PDF window and their processing status will be **Paused**. You can then review these PDF documents. Depending on the outcome of the review, you can:

- Approve the PDF documents and resume processing
- Disapprove the PDF documents and cancel them
- Choose to review the PDF document later

Open Automatically

You can choose to open the PDF document automatically as soon as it has been preflighted. You can select the option **Open Automatically** if you will be creating time-critical PDF documents which need reviewing immediately. The preflighted PDF document will then be opened in the application which you specified in the Instant PDF Preferences, e.g. Adobe Acrobat or Adobe Reader.

Save

Standard vs. Advanced Enfocus PDF Queue Editor

You can specify where and how to save the Certified PDF file when it is ready. The options which you have to save the Certified PDF document differ, depending on whether you are:

- Specifying the Save Options Using the Standard **Enfocus PDF Queue Editor**
- Specifying the Save Options Using the Advanced **Enfocus PDF Queue Editor**

Specifying the Save Options Using the Standard Enfocus PDF Queue Editor

Proceed as follows:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Standard Enfocus PDF Queue Editor**: You should see the **Advanced** button. If not, click the **Standard** button.

If one or more properties in this category is locked, see "Locking" on page 93.

4. Click the **Save** button.
5. Specify:

- What the File Name of the PDF documents should look like
- The Folder in which the PDF documents should be saved

File Name

See "File Name" on page 95

Folder

You can specify where PDF documents generated through this PDF Queue should be saved. You have the following options:

- **Use specified folder**. Select this option if you wish to save all the PDF documents generated through this PDF Queue in the same folder. Click **Browse** to select the output folder of the PDF Queue. You may also want to use variables to specify the path to this folder. If so, click **Variables** and use the appropriate variables.
- **Ask every time**. Select this option if you wish to select a folder for each PDF document that is generated by the PDF Queue. You obviously do not want to do this if you will be creating a large number of PDF documents.

Specifying the Save Options Using the Advanced Enfocus PDF Queue Editor

Proceed as follows:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.

If one or more properties in this category is locked, see "Locking" on page 93.

4. Click the **Save** category.
5. Specify where PDF documents generated through this PDF Queue should be saved. You have the following options:

- Use Specified Folder
- Ask Every Time
- Open in Application

Use Specified Folder

Select the option **Use specified folder** if you wish to save all the PDF documents generated through this PDF Queue in the same folder. Click **Browse** to select the output folder of the PDF Queue. You may also want to use variables to specify the path to this folder. If so, click **Variables** and use the appropriate variables.

Ask Every Time

Select the option **Ask every time** if you wish to select a folder for each PDF document that is generated by the PDF Queue. You obviously do not want to do this if you will be creating a large volume of PDF documents.

Open in Application

Maybe you do not only want to save your Certified PDF document and send it to a recipient using e-mail or FTP, you also want to do something else with it. For example, you may want to print the PDF document automatically as soon as it has been saved. If so, proceed as follows:

1. Select **Open in application**.
2. Click the **Browse** button and select the program file of the application in which you wish to open the Certified PDF document. You may also want to use variables to specify the path to this folder. If so, click **Variables** and use the appropriate variables.

See also:

- "Using Variables When Configuring PDF Queues" on page 89
- "Using the **Enfocus PDF Queue Editor**: Advanced and Standard Editing Modes" on page 87
- "File Name" on page 95

E-mail

Delivering Certified PDF Documents by E-mail

You can configure the PDF Queue to send the Certified PDF documents by e-mail to one or more recipients.

Proceed as follows:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select a PDF Queue in the list and click the **Edit** button.

3 Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.

4 Click the **E-mail** category.

If one or more properties in this category is locked, see "Locking" on page 93.

5 Select the option **Deliver by e-mail**.

6 Type the e-mail address of the message recipient:

- You can include multiple message recipients. Separate their e-mail addresses by a comma. For example: name1@enfocus.be, name2@enfocus.be, name3@enfocus.be
- You can specify the e-mail address directly, e.g. john.doe@enfocus.be or a qualified address, e.g. "John Doe <jd@enfocus.be>"

7 Following the on-screen instructions in the **Help** area, configure the PDF Queue to deliver the Certified PDF documents by e-mail. You have the following options:

- Configure e-mail message
- Edit e-mail preferences

Configure e-mail message

You can configure how your e-mail messages should look like by default. Click the **Configure e-mail message** button and specify the following:

- **Subject**. This can always be the same, fixed text or variable text. If you want to use variable text, click the **Variable** button and select the appropriate variables to compose your subject text with.
- **Message**. You can type standard message body text here or use variables.
- Whether or not to **attach** the Certified PDF document and the preflight report to the e-mail message.
- The **maximum file size of attachments** and what should happen if this maximum is exceeded.

Edit e-mail preferences

Make sure that the host name and port of the SMTP server for your outgoing mail have been specified correctly in the Instant PDF **E-mail Server Preferences**.

Also check and make sure that the Instant PDF **Personal Information Preferences**, and particularly your name and e-mail address, are filled in correctly. This information will be used in the **From** field of your e-mail message.

See also:

- "Preferences > E-mail Server" on page 26
- "Preferences > Personal Information" on page 19
- "Using Variables When Configuring PDF Queues" on page 89
- "FTP" on page 113

FTP

Delivering Certified PDF Documents by FTP

Instead of delivering Certified PDF documents by e-mail, you can also send them by FTP. FTP stands for File Transfer Protocol. Sending files by FTP is similar to copying files to a folder on a different network drive. You transfer files from one server to another. The difference is that the server of the recipient is not a regular file server, but an FTP server. This means the following:

- An FTP server has a typical name which can be an Internet Protocol (IP) address or a Uniform Resource Locator (URL), for example 168.192.2.1 or ftp.enfocus.com, respectively.
- You may need a user name and password to access the FTP server.

The main benefit of using FTP instead of e-mail is that you do not burden your e-mail server. Therefore, using FTP is a better option if the file size of your PDF documents can be large or if you, or the PDF creators, will be sending many PDF documents.

To configure a PDF Queue to deliver Certified PDF documents by FTP:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **FTP** category.

If one or more properties in this category is locked, see "Locking" on page 93.

5. Select the option **Deliver by FTP** and specify at least the **Server Name**. This can be an IP address or a URL, for example 168.192.2.1 or ftp.enfocus.com.

You may also want to specify:

- The **Server Port**, if required
- Choose between **Active** or **Passive** FTP.

Refer to the on-screen instructions for more details.

Providing a User Name and Password

You can enter a **User Name** and **Password** in the queue editor if you require authentication of those who will access the FTP server.

If the server requires a User Name and Password, and it wasn't entered in the Queue Editor, you will be prompted for a User Name and Password in the Jobs view when the job reaches the delivery state. You then also get the option to remember the user name and password.
However, if the User Name and Password setting is locked, the delivery will fail.

See also:

- "Preferences > E-mail Server" on page 26

Enfocus PowerSwitch

Delivering Certified PDF Documents to Enfocus PowerSwitch

Instead of delivering Certified PDF documents by e-mail or FTP, you can also send them to Enfocus PowerSwitch. Enfocus PowerSwitch is the workhorse of the Enfocus Switch product family. Using its comprehensive scripting and metadata tools you can build a smarter and more advanced workflow that integrates seamlessly with third-party technology. The workgroup client bundled with Enfocus PowerSwitch allows your team members to submit and track jobs from their own workstation.

To configure a PDF Queue to deliver Certified PDF documents to Enfocus PowerSwitch:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Select a PDF Queue in the list and click the **Edit** button.
3. Make sure you are in the **Advanced Enfocus PDF Queue Editor**: You should see the **Standard** button. If not, click the **Advanced** button.
4. Click the **Enfocus PowerSwitch** category.

If one or more properties in this category is locked, see "Locking" on page 93.

5. Select the option **Deliver to an Enfocus PowerSwitch** and specify at least the **Server Name**. This can be an IP address or a URL, for example 168.192.2.1 or powerswitch.enfocus.com.
6. You may also want to specify:

- the **Server Port**. If no Port is entered, the default port (51008) is used
- Username and Password
- The Submit Point

Refer to the on-screen instructions for more details.

Providing a User Name and Password

You can enter a **User Name** and **Password** in the queue editor.

If no User Name and Password is entered in the Queue Editor, you will be prompted for a User Name and Password in the Jobs view when the job reaches the delivery state. You then also get the option to remember the user name and password. However, if the User Name and Password setting is locked, the delivery will fail.

The Submit Point

The Flow and Submit Point defines where the Certified PDF enters PowerSwitch. You can choose between "Ask every time" and setting a specified Submit Point.

When set to "Ask every time", the user will be asked to browse to and select a Submit Point in the Enfocus PowerSwitch.

Setting a specified Submit Point is done by using the Browse button. This will connect to the Enfocus PowerSwitch, using the defined Server Name, Port, User Name and Password.

When selecting a Submit Point, only the Submit Points accessible for the active user will be shown. Therefore, a correct User Name and Password must be entered to select a Flow and a Submit Point

Submit Points that require entering metadata, can not be used, and thus will not be visible when browsing.

Summary

PDF Queue Configuration at a Glance

The PDF Queue Summary gives you a brief overview of how the PDF Queue has been configured. It consist of the following sections:

- The **Overview** section explains what the PDF Queue will do, i.e. which PDF creation and delivery methods will be used.
- The **Settings** section lists all the properties of the PDF Queue and indicates how these properties have been set.

You can scroll through the summary to quickly check the settings, or you can also use this information for troubleshooting purposes or when contacting Enfocus Customer Support.

Chapter 8

Chapter 8: Managing PDF Queues

About This Chapter

Using a PDF Queue in Instant PDF will hardly ever be a self-contained process: you may not be using just one, but several PDF Queues and you can exchange these with colleagues, PDF creators and PDF receivers. This chapter shows you how you can manage multiple PDF Queues.

Topics

In this chapter:

- Importing a PDF Queue 120
- Exporting a PDF Queue 121
- Duplicating a PDF Queue 122
- Deleting a PDF Queue 123
- Sorting PDF Queues in the PDF Queues List 123

Importing a PDF Queue

Using an Externally Supplied PDF Queue

There may be situations in which you receive a PDF Queue from someone to whom you have to deliver Certified PDF documents. This can be a colleague, a customer or a supplier, for example, a printer. They may have created a PDF Queue, sent it to you and asked you to create your PDF documents using that particular PDF Queue. In this case, you can import the PDF Queue into Instant PDF.

The following will happen when you import a PDF Queue into Instant PDF:

- The imported PDF Queue is added to the list of PDF Queues in the main Instant PDF window.
- If necessary, the name of the PDF Queue will be made unique and you will get a corresponding warning.
- If you imported a PDF Queue which originated from CertifiedPDF.net, the PDF Queue's CertifiedPDF.net status will be verified.
- If the imported PDF Queue is invalid, you will receive a warning and the **Enfocus PDF Queue Editor** will open, allowing you to correct configuration errors.

Synchronizing a PDF Queue by Reimporting

You can also reimport a PDF Queue, i.e. import a PDF Queue which already existed in your PDF Queues List. If you do this, you will have the following options:

- You can install the imported PDF Queue as a new PDF Queue. Its name will then be made unique.
- You can synchronize the existing PDF Queue with the imported PDF Queue. You will then have to select the PDF Queue in the list which you wish to synchronize. This PDF Queue will be "merged" with the imported PDF Queue. If some of the properties of both PDF Queues have been configured differently, it will be the settings of the imported PDF Queue that will be maintained. The following scenarios are possible:

Property	Existing PDF Queue	Imported PDF Queue	Result after update
1	Specified as A	Specified as B	B
2	Not specified	Specified as A	A
3	Specified as A	Not specified	A

For example, suppose the review properties of the PDF Queues have different settings:

PDF Queue	Review property
Existing PDF Queue	Pause PDF file before delivery
Imported PDF Queue	Open PDF file automatically in Adobe Acrobat or Adobe Reader

If the existing PDF Queue is synchronized, it will be the settings of the imported PDF Queue that will be retained: Open PDF file automatically in Adobe Acrobat or Adobe Reader.

You do not need to reimport a CertifiedPDF.net PDF Queue to synchronize it. The status of a CertifiedPDF.net is checked automatically and you can simply synchronize your PDF Queue with CertifiedPDF.net at a click of a button. See "Synchronizing a PDF Queue with CertifiedPDF.net" on page 130.

To import a PDF Queue into Instant PDF:

1. In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.
2. Choose **PDF Queue > Import**.
3. Select the PDF Queue to import.

The file name of a PDF Queue has the extension *.epq.

4. Click **Open**.
5. Select one of the following options and click **OK**.

- **Install as a new PDF Queue**
- **Synchronize an installed PDF Queue**, and select the PDF Queue to synchronize. Both PDF Queues will be merged.

The PDF Queue is imported and added to the list of PDF Queues.

You can also import a PDF Queue by double-clicking the PDF Queue file (*.EPQ) in Windows Explorer or the Finder in Mac OS.

6 If you installed the imported PDF Queue as a new PDF Queue, you can check and, if necessary, change the properties of the PDF Queue. If so, click **Yes** to open the **Enfocus PDF Queue Editor**.

See also:

- "Editing an Enfocus PDF Queue" on page 87
- "Exporting a PDF Queue" on page 121
- "Sorting PDF Queues in the PDF Queues List" on page 123
- "Checking the CertifiedPDF.net Status of Your PDF Queue in Instant PDF" on page 129

Exporting a PDF Queue

Saving a PDF Queue As a Separate *.EPQ File

Exporting a PDF Queue means that you save the PDF Queue as a separate file. The file name of a PDF Queue will get the extension *.EPQ. You may wish to do this for a number of different reasons. For example:

- To create a backup copy of the PDF Queue
- To share the PDF Queue with other users, for example a service provider or any other supplier of PDF documents

The EPQ file of the exported PDF Queue will also contain all relevant files which are used by the PDF Queue, such as a Preflight Profile and Action Lists, if any.

If you export the PDF Queue to be used by other people, it may be recommended to secure some of the properties of the PDF Queue with a password.

You can also distribute your PDF Queue and make it available to other Instant PDF users by publishing it to a Specification on CertifiedPDF.net.

To export a PDF Queue:

1 In the main Instant PDF window, click the **PDF Queues** button to see the list of PDF Queues.

2 Select the PDF Queue in the list which you want to export.

3 Choose **PDF Queue > Export**.

4 Specify the PDF Queue's file name and the folder where you want to save the PDF Queue.

5 Click **Save**.

See also:

- Creating and Editing PDF Queues > "Locking" on page 93.
- "Importing a PDF Queue" on page 120
- "Uploading and Publishing a PDF Queue on CertifiedPDF.net" on page 133

Duplicating a PDF Queue

Creating a New PDF Queue Based on an Existing One

You can duplicate an Enfocus PDF Queue if you quickly want to create a new queue based on an existing one. You can thus create multiple, similar PDF Queues.

This may be handy, for example, if you want to publish the same source document across various media, such as the Web, CD-ROM and an offset press. You could create dedicated PDF Queues for each of these media. Each of these PDF Queues could use the same user information and delivery methods, but have different names and Preflight Profiles. You could also have a prefix added automatically to the file name of the PDF documents, depending on the media for which they are intended. For example:

Documents you print to:	could get the file name:
the Web PDF Queue	www*.pdf
the CD-ROM PDF Queue	cd*.pdf
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See also:

- “Editing an Enfocus PDF Queue” on page 87
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- "Using and Managing CertifiedPDF.net PDF Queues" on page 127

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Chapter 9

Chapter 9:
Using and Managing CertifiedPDF.net PDF Queues

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Topics

In this chapter:

- What is CertifiedPDF.net? 128
- Checking the CertifiedPDF.net Status of Your PDF Queue in Instant PDF 129
- Synchronizing a PDF Queue with CertifiedPDF.net 130
- Uploading and Publishing a PDF Queue on CertifiedPDF.net 133
- Subscribing to a PDF Queue-based Specification on CertifiedPDF.net 136

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- "Synchronizing a PDF Queue with CertifiedPDF.net" on page 130

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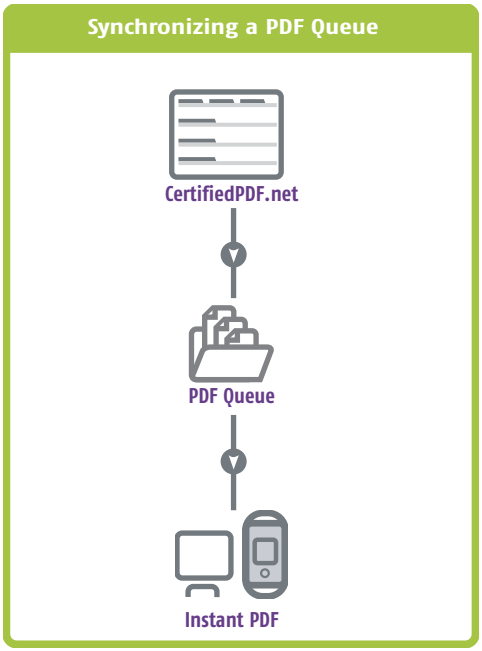

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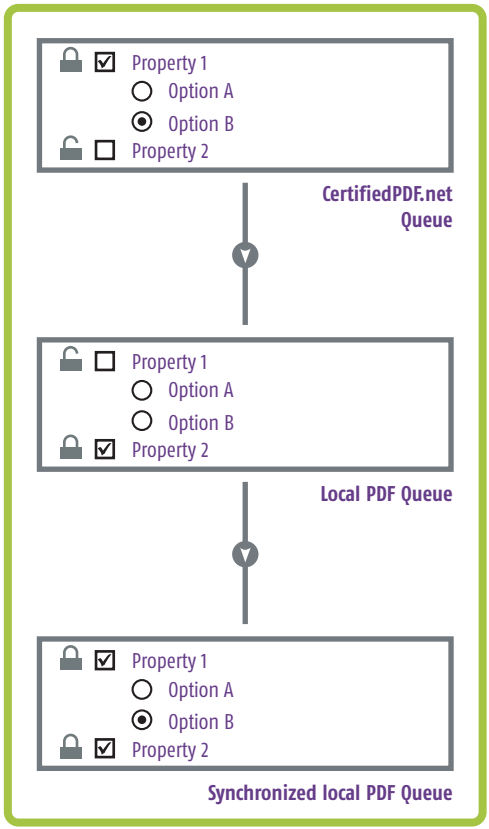

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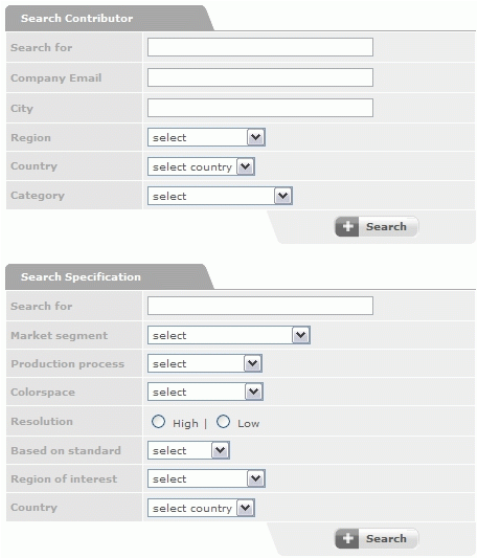

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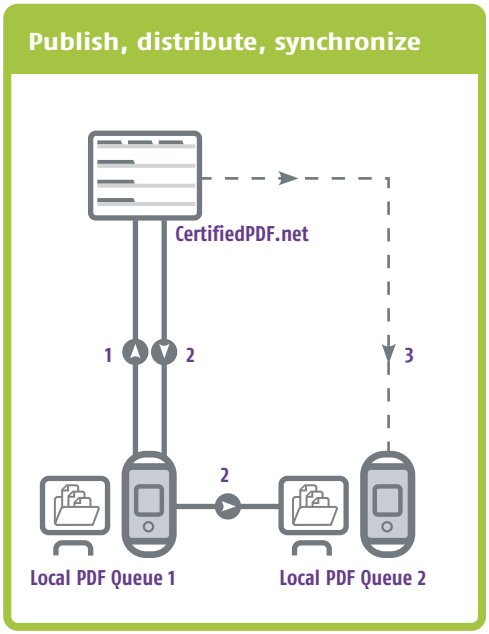

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Chapter 10

Index

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A

aborting a job 79

accessing
- Enfocus PDF Queue Editor 88
- Help from the preflight report 12
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- deriving from the Preflight Profile 96
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Action Lists
- adding to a PDF Queue 106
- defined 52
- examples 55
- in practice 55
- reasons for using ~ 52
- taking a look inside 53
- where to find them 107, 108

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Help topic, by title 13

folder
to save generated PDF documents, configuring in PDF Queue 111

FTP
configuring a PDF Queue to deliver PDF documents by FTP 113

G

guaranteed preflighting
in a Certified PDF workflow 62

H

Help
accessing from the preflight report 12
accessing from within Instant PDF 12
finding a ~ topic by keyword 13
finding a ~ topic by title 13

Help area
in the main Instant PDF window 35, 77

History list
removing jobs 80

history of the document
viewing 72

hot folders
using 57

I

Illustrator
see Adobe Illustrator CS3, CS4 or CS5

importing
configuring a PDF Queue for ~ existing PDF files 105
configuring a PDF Queue for ~ existing PostScript files 106
existing PostScript or PDF files 78
PDF Queues 120

incremental save mechanism
in a Certified PDF workflow 66

InDesign CS3, CS4 or CS5
see Adobe InDesign CS3, CS4 or CS5

informs
action type in Action List 54

installing
Enfocus Instant PDF 15
predefined PDF Queues 16

Instant PDF
buying 17
registering 17

Instant PDF Help Set
accessing 12

interpreting
Edit Log 72
preflight report 47

invalid PDF Queue
checking the configuration status of a PDF Queue 87
defined 87

J

job list in the main Instant PDF window
viewing 76

job options
deriving from the Preflight Profile 96
see also Adobe PDF Settings File
using ~ in PDF Queue 96

job processing
explained 78

jobs
canceling 79
control buttons 76
creating new ~ 78
defined 76
deleting 80
History list in the main Instant PDF window 80
information area 77
list 77
methods to create a new ~ 78
pausing 80
reasons for canceling 79
resuming 80
saving in a specified folder 81
saving just the PDF file 81
stopping 79

K

knowledge base
consulting 17

L

language
changing the ~ of the Instant PDF user interface 19

limiting
number of jobs in the History list 25

list of history jobs
deleting a job 80

list of jobs in the main Instant PDF window
viewing 76

list of PDF Queues 34
in the main Instant PDF window, explained 33
sorting 123
viewing 33

locking
collection of PDF Queue properties 94
individual properties of a PDF Queue 93
properties "on top of" other properties 93

logging methods
in a Certified PDF workflow 71

M

Mac OS X
configuring a PDF Queue for use with ~ 105
creating a Certified PDF 39

Manual
see User Guide

merging PDF Queues
synchronizing 131

messages
enabling and disabling 20

metadata
of Certified PDF documents 67
of regular PDF documents 67

minus sign (-) next to a category in the Advanced PDF Queue Editor 87

N

name
- changing the ~ of a PDF Queue 91
- configuring PDF file naming in a PDF Queue 95
- filling in the user information in the preferences 19
- of the virtual printer 104

navigating
- in Help topics 13

new jobs
- creating 78

new PDF Queue
- creating a ~ yourself 86
- creating based on an existing one 122
- creating from CertifiedPDF.net 136

non-Certified PDF documents
- converting to Certified PDF documents 38

not synchronizing with CertifiedPDF.net
- CertifiedPDF.net status of a PDF Queue 129

not up-to-date with CertifiedPDF.net
- CertifiedPDF.net status of a PDF Queue 129

O

opening PDF documents
- automatically for review, configuring a PDF Queue 110
- in an application, configuring a PDF Queue 111

out-of-date with CertifiedPDF.net
- CertifiedPDF.net status of a PDF Queue 129

output options
- bleed 97
- printer marks 97
- spreads 97

P

partially valid PDF Queue 87

pausing
- jobs 80
- PDF documents for review 109

PDF creation process, explained 30

PDF documents
- creating ~ by printing to a virtual printer 40
- creating ~ from PostScript files 40
- creating ~ in Adobe Illustrator CS3, CS4 or CS5 37
- creating ~ in Adobe InDesign CS3, CS4 or CS5 36
- creating ~ in Mac OS X 39
- creating ~ the conventional way 30
- creating ~ the Enfocus way 32
- creating~ in QuarkXPress 7 or 8 35

PDF editing
- conventional approach 64
- in a Certified PDF workflow 64
- issues 64

PDF export
- configuring a PDF Queue for ~ from QuarkXPress 7 or 8 99

PDF export settings
for direct PDF export: deriving from a QuarkXPress 7 or 8 PDF Output Styles file (*.XML) 99
for PostScript (PS) export: deriving from a QuarkXPress 7 or 8 Print Output Styles file (*.XML) 99

PDF file
saving just the ~ of a job 81

PDF Output Styles
save and link in QuarkXPress 7 or 8 98

pdf profiles
see Preflight Profiles

PDF Queue
adding Action Lists 106
changing the name or description 91
configuring for direct PDF export from QuarkXPress 7 or 8 99
control buttons 33
created by Enfocus 16
created by third parties 16
creating a new ~ 86
creating a new ~ based on an existing one 122
creating a new ~ from CertifiedPDF.net 136
creating a new ~ yourself 86
defined 33
deleting 123
duplicating 122
editing 87
exporting 121
importing 120
information area 34
invalid 87
locking and unlocking properties 93, 94
overview of properties 90
partially valid 87
presenting as virtual printer 103
properties 90
publishing on CertifiedPDF.net 133
sorting the PDF Queues list 123
using Adobe PDF Settings File (*.joboptions) 96
using Job Options 96
valid 87
viewing the list of PDF Queues 33

PDF Queue Editor
standard vs. advanced 110

PDF Queues list 34

PDF Queues list in the main Instant PDF window
explained 33

PDF Settings File (*.joboptions)
using ~ in PDF Queue 96

PDF style (Adobe Illustrator CS3, CS4 or CS5 ~)
see preset

PDF style (Adobe InDesign CS3, CS4 or CS5 ~)
see preset

PDF workflow
conventional 30

personal information in a Certified PDF document
changing 67
viewing 67

plus sign (+) next to a category in the Advanced PDF Queue Editor 87

PostScript files
converting to Certified PDF documents using a PDF Queue 96
importing to convert them to Certified PDF documents 78

PostScript Printer Description (PPD) file
selecting when configuring the virtual printer properties of a PDF Queue 104

PostScript to PDF
configuring a PDF Queue for PostScript to PDF conversion 96

PowerSwitch
configuring a PDF Queue to deliver PDF documents to PowerSwitch 114

PPD
see PostScript Printer Description file

ppp
see Preflight Profile: adding to a PDF Queue

preferences
Applications 26
becoming member of the CertifiedPDF.net community 21
categories 18
CertifiedPDF.net Account 21
changing e-mail ~ 112
checking for updates 20
Job Processing 23
Jobs History 25
Language 19
Preflight Report Help 25
Sending E-Mail 26
Synchronize 22
units 21
User Information 19

Preflight Profile
adding to a PDF Queue 108
definition 46
error level options 47
predefined 46

Preflight Profile status
of Certified PDF documents 70

preflight report
errors and warning explained in Help topics 25
hyperlinked symbols 48
interpreting 47
problem severity levels 47
viewing 47

preflighting
adding a Preflight Profile to a PDF Queue 108
defined 46
guaranteed 62
in a Certified PDF workflow 62
issues 62
mechanism explained 46
using Preflight Profiles 108

prerequisites
for creating a Certified PDF in Adobe Illustrator CS3, CS4 or CS5 37
for creating a Certified PDF in Adobe InDesign CS3, CS4 or CS5 36
for creating a Certified PDF in QuarkXPress 7 or 8 35

preset
using an Illustrator print ~ or PDF ~ in a PDF Queue 102
using an InDesignprint ~ or PDF ~ in a PDF Queue 100

printer 103

printer drivers
defined 104

printing to a virtual printer to create a Certified PDF document 41

problem reporting 47

problem severity levels
defined 47
example 47

processing steps
defined 32, 78

properties of a PDF Queue 93
locked in the CertifiedPDF.net Queue, synchronizing PDF Queues 132
locked in the local PDF Queue, synchronizing PDF Queues 132
locking and unlocking 93
not in your local PDF Queue and not in the CertifiedPDF.net Queue 132
overview 90

PS
see PostScript files

PS (PostScript) export
configuring a PDF Queue for ~ from QuarkXPress 7 or 8 99

Q

qpj: QuarkXPress 7 or 8 Print Output Styles file
see QuarkXPress 7 or 8: deriving PDF export settings from a Print Output Styles file

qpo: QuarkXPress 7 or 8 PDF Output Styles file
see QuarkXPress 7 or 8: deriving settings from a PDF Output Styles file

QuarkXPress
creating a Certified PDF 35

QuarkXPress 7 or 8
creating a Certified PDF 35
deriving PDF export settings from a PDF Output Styles file (*.XML) 99
deriving settings from a Print Output Styles file (*.XML) 99
prerequisites for creating Certified PDF documents 35
using Instant PDF as a plug-in for ~ 98

QuarkXPress 7or 8
save and link PDF Output Styles 98
save and link Print Output Styles 99

Queue
see PDF Queue

QXP
see QuarkXPress

R

references to source files
in a Certified PDF document 65

registering Instant PDF
online 17

reimporting
PDF Queue 120

removing
jobs from the list of jobs 80
PDF Queues from the list of PDF Queues 123

renaming a PDF Queue 91

report
interpreting 47

reporting
problems with Instant PDF 18

responsibility
in a Certified PDF workflow 65

resuming
paused jobs 80

reviewing
accepting or rejecting PDF documents 82
configuring a PDF Queue for ~ 109
opening PDF documents automatically for review 110
pausing PDF documents 109
PDF document 82
step in job processing 82

roll-back mechanism
in Certified PDF documents 66

S

save and link
Adobe Illustrator CS3, CS4 or CS5 PDF Preset 102
Adobe InDesign CS3, CS4 or CS5 PDF Preset 100
QuarkXPress 7 or 8 PDF Output Styles 98

saving
a document as Certified PDF in Adobe Acrobat 8 or 9 38
a document as Certified PDF in Adobe Illustrator CS3, CS4 or CS5 37
a document as Certified PDF in Adobe InDesign CS3, CS4 or CS5 36
a document as Certified PDF in Mac OS X 105
a document as Certified PDF in QuarkXPress 7 or 8 35
a PDF Queue as a separate *.EPQ file 121

saving jobs
in a specified folder 81
saving just the PDF file 81

selections
action type in Action List 53

sessions
editing ~ in a Certified PDF 72

severity levels
example 47

SMTP server settings
preferences 26

sorting
PDF Queues in the list 123

source file references
in a Certified PDF document 65

specification on CertifiedPDF.net
defined 128

standard Enfocus PDF Queue Editor 110

starting
a Certified PDF workflow 69
a Certified PDF workflow for a PDF document 68
Instant PDF 15

status
button in Adobe Acrobat 68
Certified PDF ~ of a document 70
CertifiedPDF.net ~ of a PDF Queue 129
configuration ~ of a PDF Queue 87
document ~ of Certified PDF files 68, 70
Preflight Profile ~ of Certified PDF documents 70

stopping
jobs 79

subscribing
becoming member of the CertifiedPDF.net community 128
to a PDF Queue-based specification on CertifiedPDF.net 136

summary of the PDF Queue properties 115

support
getting Enfocus ~ 17

synchronizing
a PDF Queue by reimporting 120

synchronizing PDF Queues
from CertifiedPDF.net Queue to local PDF Queue 130
properties locked in the CertifiedPDF.net Queue 132
properties locked in the local PDF Queue 132
properties not locked 132
specifying the frequency 22

system information
in Certified PDF documents 67

system requirements 14

U

unable to verify with CertifiedPDF.net
CertifiedPDF.net status of a PDF Queue 129

unit of measurement
selecting a default ~ 21

unlocking
collection of PDF Queue properties 94
properties of a PDF Queue 93

up-to-date with CertifiedPDF.net
CertifiedPDF.net status of a PDF Queue 129

updates
checking for ~ 20

use specified
folder, configuring the Save options of a PDF Queue 111
name, configuring PDF file naming of a PDF Queue 95

User Guide (PDF)
accessing 12

user identification
Certified PDF 67

using a Preflight Profile
in a Certified PDF document 62
in a PDF Queue 46

V

valid PDF Queue
checking the configuration status of a PDF Queue 87

variables
structure 90
using ~ when configuring a PDF Queue 89

viewing
document history 72
edit log file 71
editing sessions 72
jobs 76
list of editing sessions of a Certified PDF document 72
PDF Queues 33
preflight report 47, 71
text version of the preflight report of a Certified PDF document 71

viewing your personal information in a Certified PDF document 67

virtual printer
defined 40
presenting a PDF Queue as a ~ 103
printing to a ~ to create a Certified PDF 40

W

warnings
enabling and disabling 20

workflow
starting a Certified PDF ~ for a document 68

X

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see QuarkXPress

Enfocus

Kortrijksesteenweg 1095
9051 Gent
Belgium

T: +32 9 216 92 11
F: +32 9 216 92 12

info@enfocus.com
www.enfocus.com

Enfocus Inc.

8535 Gander Creek Drive
Miamisburg, OH 45342
United States

T: +1 800 676 1775
F: +1 937 454 1702

info@enfocus.com
www.enfocus.com